RELATIONSHIP MANAGER, MAJOR GIFTS & PLANNED GIVING

JOB DESCRIPTION
REPORTS TO: VP DONOR ENGAGEMENT & STEWARDSHIP
JULY 2019

POSITION SUMMARY
The purpose of this position is to raise funds for the Cradle to Career strategy by growing the segment of major gifts ($5,000+) through high quality relationship building, cultivation and stewardship of high-net-worth donors and prospects (MIG donors). The position requires a year round and multi-year planning and execution process designed to ensure consistent and evolving activity and gift acquisition. Under the supervision of VP Donor Engagement & Stewardship and working in collaboration with the CEO, the Manager will be responsible for a portfolio of donors and prospects with significant major gift potential. The Manager is also responsible for ensuring the promotion of planned giving opportunities, tools, and establishing annual and multi-year measures of progress.

ESSENTIAL FUNCTIONS & PERCENTAGE SPENT ON EACH
The tasks, duties and responsibilities of the position which are most important to get the job

- 55% Year round cultivation of prospects, solicitation and stewardship of high-net-worth donors.
- 20% Development and implementation of stewardship strategies that include engagement and recognition activities.
- 10% Coordinate with VP Donor Engagement & Stewardship to develop and monitor annual work plans and goals including collaborating with CEO with respect to his/her prospect/stewardship list.
- 15% Administrative duties including active use of Andar to capture donor data including calendaring all activities and documenting notes and action items following all meetings.

CORE FUNCTION & COMPETENCIES:
- Development of an annual plan that includes excellent cultivation and stewardship.
- Understanding of Cradle to Career Strategy (C2C), outcomes and opportunities for investment.
- Ability to understand donor affinity and align opportunities for investment.
- Assist with Product Development through identification of donor interest and creation of specialized products for solicitation that align with Cradle to Career.
- Work closely with other Relationship Managers, Marketing and Community Impact staff to improve outreach, engagement and connection to Cradle to Career among MIG donors.
- Undertake prospect research and identification, including engaging in continuous cultivation of new prospects.
- Create and establish annual and multi-year measurement tools for assessment of current efforts and opportunities for progress and advancement.
- Ensure effective control systems that identify barriers, and address these issues with urgency and resourcefulness.
- Prepare written materials associated with cultivation, solicitation and stewardship of donors and prospects (e.g. development of targeted proposals, financial illustrations of gift vehicles, progress/stewardship reports on projects funded and general correspondence).
- Develop, implement and monitor a donor relationship utilizing a moves management approach and maintain accurate relationship/donor records in CRM.
- Must be able to bring donors to action (close the deal).
• Identify and integrate planned giving options into donor relationship development activities to appropriate prospects to secure planned gifts (bequest, securities, annuities etc.)
• Develop applications to Foundations and other granting organizations to support the C2C strategy
• Demonstrated ability to work collaboratively in a team environment

MINIMUM JOB REQUIREMENTS

Knowledge, Skills and Abilities

Education: Post-secondary degree/diploma preferably in marketing and communications
Experience: 3 years’ experience in major and planned giving disciplines or five years in a fundraising or sales role.
Specific Skills: Extremely effective interpersonal skills.
   Excellent communication (verbal and written) skills.
   Demonstrated success in consultative selling.
   Ability to relate with a diverse group of individuals.
Working conditions: 55% of time spent in direct donor development outside of the office. Maintains a valid driver’s licence and has access to own transportation. Ability to work flexible hours including occasional evenings and weekends.
Computer Experience: Proficient computer skills including knowledge of customer relationship management systems, and Microsoft Office software programs.