



MANAGER, MAJOR AND PLANNED GIVING, QUEBEC POSITION BRIEF





TABLE OF CONTENTS

The Opportunity.....	2
About the Arthritis Society	3
Our Strategy: Accelerating Impact.....	4
Sources of Fundraising Revenues 2021	5
FY22 ~ Key Fundraising Priority Areas, Quebec	7
Additional Information.....	8
Key Areas of Accountability	9
Core Competencies and Skills	11
Qualifications and Experience	12
Biographies	13
Organizational Chart	14

FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of the Arthritis Society. For more information about this opportunity, please contact Mona Ip, Senior Search Consultant, KCI Search + Talent by email at ArthritisSociety@kci talent.com

All inquiries and applications will be held in strict confidence. Interested candidates should send resume and letter of interest to the email address listed above by June 9, 2022.

In furtherance of its mission and strategic priorities, the Arthritis Society commits to promoting inclusion, diversity, equity and access (IDEA) through its information and support, advocacy, programming, internal policies, and governance structures. In selecting individuals and furthering the goals of our IDEA work, the Arthritis Society will aim to ensure that our people reflect the knowledge, experience, skills and diversity (including but not limited to diversity of gender, race, and geographical location) of the communities we live in and serve.

Please note that the hiring salary range for this position is from \$80,000-\$90,000 based on experience.





Manager, Major and Planned Giving, Quebec

THE OPPORTUNITY

The Arthritis Society is seeking a seasoned fundraising professional as the Manager, Major and Planned Giving.

Reporting to the Vice President, Quebec, and working as part of the broader nationwide revenue development team, the Manager, Major and Planned Giving is accountable for securing and maintaining major and planned giving revenue in Quebec, to support the mission of the Arthritis Society.



This important role will build a robust, qualified donor pipeline and establish and maintain long-term relationships with a portfolio of current and potential corporate, family foundations and individual donors. The new Manager will be the lead relationship builder with 100+ major giving donors/prospects in Quebec, including identification, prospect research, cultivation, solicitation, and stewardship of major gift donors. With accountability for building and managing the Quebec planned giving program, the new incumbent is also responsible for estates, planned gifts, individuals, and other stakeholders, managing a pipeline of identified planned giving prospects, soliciting prospects regularly with a goal to move them from interested to confirmed planned giving donors, and building relationships with a network of planned giving professionals for advisory purposes.

WHAT WE DO AND WHY JOIN US

The Arthritis Society is on a mission to fight the fire of arthritis with the fire of research, innovation, advocacy and information and support. That's because arthritis robs six million Canadians of their mobility, mental and physical well-being, and in some cases, their livelihood.

An essential member of the Arthritis Society's development team, the Manager will help to implement and deliver our five year strategic revenue goals across Quebec.

A career at the Arthritis Society is more than just a job. It's an opportunity to use your talents to push back against the devastation of arthritis. Fighting the fire of arthritis gives meaning to our work, incites collective action and drives us to excellence in all we do. Our bold and ambitious strategic plan, *Accelerating Impact*, is propelling our work to create transformational change. We are a diverse, innovative, agile and performance-driven culture. Our people are essential to our efforts, and we will empower you to be successful in your role. The Arthritis Society is honoured to be a 2019-2021

Canada's Most Admired™ Corporate Cultures winner, and proud to be accredited under Imagine Canada's Standards Program.

Some highlights of what we offer:

- **Performance Rewards:** Pay for performance incentive program.
- **Health & Wellness:** Extended healthcare benefits (including dental, vision, prescription drugs & disability coverage), choice of healthcare spending account and/or healthy living account, EAP & discounted fitness membership.
- **Time-Away Programs:** Vacation (at least 3 weeks), personal days, holiday closure & summer hours.
- **Retirement Planning:** DCPD whereby you contribute 4% of earnings and we match this with 5%.

Our Quebec regional office is located at 5160 Decarie Boulevard and this role offers flexibility to work from home according to a hybrid model. This position entails some travel in the region and occasionally to the national office in Toronto.

ABOUT THE ARTHRITIS SOCIETY

Arthritis is painful, devastating and affects more Canadians than any other chronic health condition. As many as 6 million Canadians live with arthritis (that's 1 in 5 adults, plus 3 of every 1,000 children). Without bold and sustained action, the number of Canadians with arthritis will rise to nine million by 2040. Arthritis is denying 1,500,000 Quebecers a normal life.

Arthritis comes in many forms. It can lead to significant, often irreparable, damage to a person's joints, skin, organs and other areas of the body. Pain, fatigue, loss of function, disability, and even death can result. There is no cure.

The damage is real. The impact is vast. The challenges are serious. And half measures are not enough. Tackling arthritis requires dedication and a coordinated, strategic effort.

Fueled by donors and volunteers, the Arthritis Society is Canada's preeminent national health charity working to raise awareness, support people with arthritis, advocate for public policies as a critical patient voice, and fund vital research to create a world where people are free from the devastating effects that arthritis has on lives.

We are an energizing and diverse corporate culture, constantly learning, rigorously measuring our work, and building on our achievements to reach more people nationwide.

OUR VISION

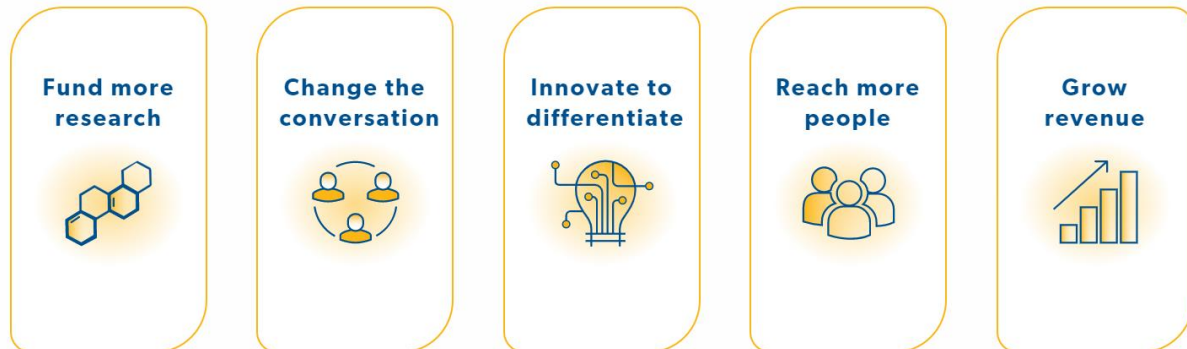
We will extinguish arthritis.

OUR MISSION

To fight the fire of arthritis with research, advocacy, innovation, information and support.

OUR STRATEGY: ACCELERATING IMPACT

Accelerating Impact, the Arthritis Society's 2025 Strategic Plan, will guide our efforts. The Arthritis Society will:



Accelerating Impact is ambitious and bold, because that's what's needed to achieve meaningful change on this urgent issue. The Arthritis Society has a disease to crush and a constituency to elevate. We are all in to end arthritis, so people with arthritis can live their best life free from arthritis.

Fund more research

What success looks like:

Research has a positive impact on health

INVEST
\$30M
in research

FUND
95
new innovative research
projects

LAUNCH
380
new research careers

MULTIPLY
10x
our research investments by
other funders

Innovate to differentiate

What success looks like:

Innovation creates new ideas that change lives

ACTIVATE
at least
3
innovation
programs

IMPLEMENT
a
**SOCIAL
IMPACT**
investment

Change the conversation

What success looks like:

People view arthritis as serious and have access to timely and effective care

ELEVATE
arthritis to a
TOP 5
health concern

INSPIRE
25,000
actions by
Canadians

ENGAGE
policy makers on
300
occasions

IMPACT
30
public policies

Reach more people

What success looks like:

People affected by arthritis are empowered and more resilient

REACH
3 MILLION
Canadians each year with
trusted information

CONNECT
300,000
Canadians with our
information and
support programs

EMPOWER
90%
of program users to better
manage their arthritis

HELP
3,500
children and families
to thrive with arthritis

Grow revenue

What success looks like:

Donors are inspired and motivated to give to fuel our mission

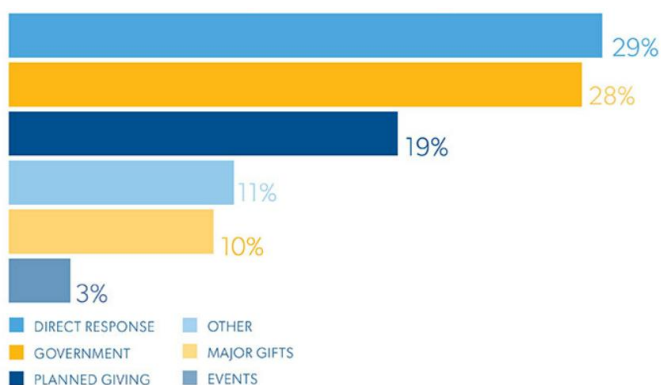
INCREASE
annual fundraising
revenue by
**10 MILLION
TO \$30 MILLION**

DECREASE
Cost-per-dollar-raised

The Arthritis Society Board of Directors appointed a new CEO in February 2020, and a new Chief Development Officer in April 2020, with a keen focus on managing expenses and driving enhanced revenue results to ensure an annual balanced budget in FY21, and beyond. After reporting an overall deficit in 2019/20, a new lean, strategic and efficient approach led to positive and steady revenue results in 2020-2021, even during the pandemic.

The revenue goal for Quebec in 2022-2023 is \$1.225m which will be based primarily on individual, foundation and corporate major gifts and expected planned gifts. In-person events will also return in 2023.

SOURCES OF FUNDRAISING REVENUES 2021: 26,452,635



INNOVATION STRATEGY FOR TRANSFORMATIONAL CHANGE: \$25 MILLION CAMPAIGN

The arthritis community is changing rapidly. Advancements in technology, greater collaboration between stakeholders and an alarming increase in the number of new arthritis diagnoses are bringing both opportunities and challenges that were unforeseen even a decade ago. Now is the time to expand beyond the research labs to fund ambitious ideas and build an ideator ecosystem connecting academics, entrepreneurs, corporations and consumers to propel innovation and commercialization.

That's why we launched [25 x 25](#), our biggest and boldest campaign yet. With a goal to raise \$25 million by 2025, the campaign has the potential to uncover, unlock and unleash the most powerful solutions to solve some of Canada's pressing healthcare concerns around chronic pain and chronic illness.

Our connections to academic, research and care delivery communities, reputation as a trusted source of information and funding, and nationwide infrastructure to support stakeholders across the country uniquely position the Arthritis Society to facilitate real, lasting change.

To that end, we have identified three pillars of strategic, disruptive innovation to deeply and meaningfully change the course of arthritis:

Pillar 1 ~ Ignite Research Grants

Unlock transformative solutions by investing in high-risk, high-reward research

Canada is home to many exceptionally talented, creative arthritis researchers and innovators. The Arthritis Society seeks to tap into this potential and unlock truly novel ideas with the potential for significant impact in five priority areas: arthritis pain, osteoarthritis, inflammatory arthritis, childhood arthritis, and arthritis and work.



Ignite Grants support the development and testing of transformative, paradigm-shifting concepts and approaches to address critical barriers to progress in arthritis research, challenge our understanding of arthritis and its management, and generate new approaches to confront the challenges we face in defeating arthritis and delivering the best evidence-informed care possible.

Projects are based on high-risk ideas with strong potential for high reward. Because projects are at an early stage of development, a high level of risk is expected and not all projects will yield anticipated results. However, those that succeed will generate high rewards: significant and real change or impact in areas related to the prevention, detection, diagnosis, and treatment of arthritis, and support for people living with the disease.

In November 2021, the Arthritis Society [announced nine innovative projects](#) funded through the inaugural round of Ignite Grants. Thanks to donor support, we will commit close to \$900,000 to these projects over the next two years.

Pillar 2 ~ Social Impact

Unleash transformative, sustainable solutions by partnering to address system-wide issues

The Arthritis Society's Social Impact Program was created to sustainably deploy innovative therapies, programs and interventions that impact the healthcare or social systems to the benefit of people with arthritis. With our strength in federal and provincial government relations and our ability to attract donors and investors, we will bring funders, innovators and other partners together to unleash solutions to solve system-wide problems like navigation, inequitable access to care, disability at work, reducing wait times and more. To do so, we're reaching out to researchers and clinicians nationwide, asking them what they have that could positively impact the lives of Canadians living with arthritis.

Our goal is for people with arthritis to benefit from evidence-based interventions that exist or are in development but are not yet widely available or implemented. Any resulting intellectual property will remain with the applicant/host institution.

[Our first call for Expressions of Interest \(EOIs\)](#) focuses on solutions that will improve access to care for people living with arthritis, including navigating the healthcare system and solutions addressing inequities in arthritis care in Canada. Applications are assessed by the Arthritis Society and external experts in arthritis care and social impact programs. We plan to advance up to two social impact projects from concept to reality within the next year.

Pillar 3 ~ Ideator Program

Uncover innovators and accelerate their ideas

The [Arthritis Ideator Program](#) challenges entrepreneurs, ideators and start-ups to invent and tailor practical solutions that could benefit people living with arthritis, while accelerating their success by getting their innovations to the people who need them, sooner.

We will award upwards of \$200,000 annually to game-changing opportunities that demonstrate:

- High-risk, high-reward ideation
- Ideators with commitment, tenacity, experience and adaptability
- Transformational innovation
- Possibility for impact to sell and market the innovation
- A capacity to bring the idea to market



The first awards were presented at the [Arthritis Ideator Awards](#) in Toronto on April 21, 2022, where eight finalists pitched their projects to a panel of judges. Four \$50,000 awards were granted: three selected by the judges, and one People's Choice Award determined by popular vote. The event was simulcast nationwide, and several in-person viewing events were held in other Arthritis Society regions.

Grant winners will be invited to the following year's Ideation Den to present the results of their funding, strengthening the relationship between our funders and ideators and demonstrating real impact.

FY22 ~ KEY FUNDRAISING PRIORITY AREAS, QUEBEC

Aside from the \$25 million campaign nationwide, the Arthritis Society is currently seeking major gift support from individuals, corporations and foundations for the following priority projects in Quebec:

Aide entrAide

[Arthritis Connections \(Aide entrAide in Quebec\)](#) connects people living with arthritis and provides them with opportunities to engage and to learn from each other by breaking down the isolation that sometimes comes with the disease. Thematic Aide entrAide workshops provide a virtual space for people living with arthritis to come together, learn about their disease and build relationships. Aide entrAide is a community of peers where people can share their experience and have open and honest discussions about their lives with arthritis within a supportive environment.

Arthritis Talks

[Arthritis Talks](#) is the Arthritis Society's signature webinar series which brings current, evidence-based information straight from the experts. Covering a range of topics related to lifestyle, medications, surgery and various types of arthritis – you'll feel more empowered and able to tackle the challenges that come with arthritis after watching a live webinar or viewing a recording.

Summer Camp Campaign

For the 4500 young people in Quebec living with arthritis, pain, physiotherapy, constant medication and isolation caused by their disease represent a major part of their everyday life, including during summer holidays. In order to help these kids create positive and unforgettable summer memories, the Arthritis Society – Québec Division, in collaboration with its invaluable partners, offers them the chance to participate in the [Kids on the Move Camp](#), run specifically for children living with rheumatic diseases.

The environment, activities, medical care and all other aspects of the camp are adapted to these kids' specific needs. Everything is designed to allow them to live out the experience of the summer camp at its best - to flourish, to gain self-confidence and, finally, to share their experience with other children facing the same challenges.

Signature Event – Gala in 2023

The gradual lifting of pandemic restrictions and relatively high vaccination rates in Quebec and across Canada in 2022 will allow in-person events to return in 2023, including the Arthritis Society's first signature Gala event in Quebec.

Research

A large proportion of the Arthritis Society's national research budget is awarded each year to Quebec researchers. Aside from funding diverse medical and scientific research projects, the Arthritis Society also provides financial support to four Arthritis Research Centers (ARC) of Quebec, dedicated to arthritis research, treatment of sufferers and teaching. Each unit has its own research field and is in a university hospital: University Hospital Centre in Montreal, McGill University Health Centre, Centre Hospitalier Universitaire de Sherbrooke and the University Hospital of Quebec.

ADDITIONAL INFORMATION

[2020-2021 Annual Report](#)

[Board of Directors](#)

[Our Strategy](#)

[National Fundraising Council](#)

[25 x 25 Innovation Fund](#)

[Arthritis Society Partners](#)

[About Arthritis](#)

[News Releases](#)

[Leadership Team](#)

[2021 Financial Statements](#)

KEY AREAS OF ACCOUNTABILITY:

Major Gift, Corporate & Family Foundations (50%)

- With keen focus on major gift donors, corporate and family foundations, build strong, robust, values-based relationships with a pool of current and identified donors/prospects in Quebec (+ nationwide, as needed) to meet organizational, departmental and individual targets.
- Work closely with Vice President and full revenue development team to manage a pipeline of Quebec based donor prospects, as part of a nationwide “prospect coordination & progress” system.
- Research and identify current and potential major gift, corporate & family foundation prospects (Quebec, national + some in the regions) to identify giving potential, alignments and targeted approaches for support.
- Manage assigned donor pool to ensure all donors receive appropriate stewardship and recognition to ensure continued engagement.
- Build and maintain the major gift, corporate & family foundation donor pipeline (100+ Quebec donors), including database tracking, ensuring that all contacts with donor and prospective donors are tracked and recorded accordingly in the Raiser’s Edge database.
- Manage the preparation of letters of intent, applications and/or proposal overviews, full proposals, presentations, stewardship reports, needed to fulfill the complete donor cycle of their pipeline.
- Track, monitor, and achieve key goals, metrics and deliverables, as set by the Vice President.
- Where appropriate, enlist the strategic support of fundraising volunteers to assist with asks and donor engagement.

Planned Giving & Quebec Estate Administration (40%)

- Set the Quebec annual planned giving plan and budget, with final approval from the Vice President and Director, Planned Giving.
- Manage and implement the Arthritis Society’s planned giving program in Quebec, including current donor cultivation and stewardship, as well as generating significant new opportunities for planned giving (and other revenue programs as appropriate) by leveraging both the Arthritis Society’s existing donor database, bi-annual planned giving survey, planned giving scoring as well as the other existing planned giving lead generation activities.
- Build and manage a pipeline of 200+ planned giving prospects, actively soliciting these prospects to confirm a minimum of 10-20 new planned giving commitments and or confirmations annually.
- Work closely with Quebec, and nationwide major gifts team to maintain relationships with established and new planned giving donors and prospects including visits, announcements, invitations and information exchanges.
- Maintain, enhance and develop these relationships for mid, major and/or planned gifts, with a clear focus on planned gifts.

- Oversee the tracking of matured planned gifts annually to make projections on expected revenue generation, e.g., annual revenue goals, average bequest size, trends for 'surprise' bequests, etc.
- Aligned with the full Planned Giving team, input, manage and maintain documentation/data related to planned giving donor meetings and requests within Raisers Edge.
- Update and maintain current and accurate planned giving donor information in Raiser's Edge database, and regularly reconcile the monthly planned giving tracking report, ensuring all planned giving information for Quebec is accurate.
- Independently review documentation received for Quebec bequest and estate gifts and administer files with executors/lawyers/planned giving experts, paying close attention to legal requirements, regulations, family laws, etc.
- Prepare legal releases for Quebec estate gifts to execute under seal for signature by the Arthritis Society's signatory officer(s), during various stages of estate administration.
- Act as liaison with internal and external stakeholders, including timely telephone support and inquiries from lawyers, executors, trust officers, next-of-kin, and liaison with bequest administrators at other charitable organizations.
- Administer estates, charitable gift annuities, charitable remainder trusts, gifts of securities, life insurance policies, and endowments in an accurate and timely fashion, ensuring the best interests of the organization are met.
- Understand and leverage the Arthritis Society's suite of planned giving tools and products to help achieve annual and five (5)-year revenue goals.
- Monitor results to determine effectiveness of strategies and to maximize their use.
- Work with appropriate staff nationwide for planned giving gift administration.

Stewardship (10%)

- In response to major and planned gifts received, coordinate and facilitate prompt and immediate gift acknowledgment and receipting.
- Main staff lead in Quebec to manage, monitor and administer all stock gift donations, working closely with our stockbroker and/or donors' stockbrokers as needed to sell every gift of shares within our Policy.
- Coordinate stewardship, cultivation and solicitation mailings and custom packages as needed or mandated by the donor.
- Assist in creating impact pieces used in securing, renewing and upgrading relationships with donors and potential donors.
- Work with the Manager, Donor Stewardship & Engagement to ensure a centralized stewardship and recognition program throughout Quebec to support and promote relationship building and long-term relationships through program logistics and recognition systems.

- Work closely with donor and data services to ensure that all donations from active and prospective donors are accurately entered in Raiser's Edge, acknowledged and/or quickly routed to the appropriate staff solicitor for timely recognition and follow-up.

CORE COMPETENCIES AND SKILLS:

Integrity

- Show personal accountability and deliver on commitments.
- Take immediate steps to raise ethical issues.
- Take actions and make decisions based on what is best for the Arthritis Society, or people with arthritis.
- Exhibit professionalism.

Passionate Commitment

- Demonstrate a deep and thorough interest in and understanding of the Arthritis Society and its mission.
- Promote the organization and its work.
- Take initiative and seek out and/or willingly accept new challenges, responsibilities and assignments.

Bold Innovation

- Experiment and take managed risks.
- Seek challenging opportunities and new approaches.
- Continually re-evaluate work and performance with a view to improvement.
- Value and encourage innovation, creativity and non-traditional ideas from others.
- Demonstrate flexibility and adaptability, with openness to different views and approaches.

Spirited Teamwork

- Work to develop and foster collaborative relationships.
- Actively listen to and solicit diverse points of view.
- Treat others with dignity and respect; engage in healthy respectful disagreement on topics / issues.
- Work to actively resolve conflicts, demonstrating healthy and effective problem solving and conflict management skills.
- Create partnerships that strengthen the organization's role and reputation.

Courageous Leadership

- Show leadership, regardless of position.
- Take responsibility for the highest quality and timeliness of work.
- Work constructively to resolve issues and solve problems.
- Model our values.
- Demonstrate confidence in the future.
- Take initiative and seek out or willingly accept new challenges, responsibilities and assignments.

SCOPE AND ACCOUNTABILITY (SUPERVISORY, FINANCIAL):

- Accountable to achieve assigned revenue development goals.
- Budget accountability, as determined by the Vice President.

Values

Accelerating Impact is empowered by a diverse, agile and performance-driven culture with staff and a robust volunteer community living our values of:

- ♥ Integrity
- ♥ Passionate commitment
- ♥ Spirited teamwork
- ♥ Bold innovation
- ♥ Courageous leadership

QUALIFICATIONS AND EXPERIENCE

- Five (5) years of progressive revenue development experience, gained from a similar fundraising environment, working directly and successfully with donors to build giving capacity.
- Post-secondary education in fundraising, business or a related field, or equivalent combination of experience and training.
- Outstanding relationship-building skills, with demonstrated ability to deliver a high level of customer service to donors, volunteers and other contacts throughout the relationship cycle including cultivation, solicitation and stewardship.
- Demonstrated ability to manage multiple priorities.
- Ability to use discretion, judgment and tact in handling highly sensitive, confidential information related to donor information.
- Driven, energetic, self-motivated and results-oriented fundraiser, with a passion for philanthropy.
- Strong interpersonal skills, with the ability to work in a collaborative style with local and nationwide colleagues and stakeholders, both in-person and remotely.
- Exceptional written, oral and presentation skills. Bilingual (English and French) language skills essential.
- Strong level of comfort and experience with donor databases (Raiser's Edge experience preferred) and Microsoft Office.
- AFP and CAGP membership in good standing an asset.

OTHER REQUIREMENTS:

- Must have access to a vehicle, valid driver's license, insurance and able to travel within Quebec.
- Role located in Montreal.
- Requirement to be flexible and work additional hours to support business needs, where necessary or undertake other duties as assigned.

BIOGRAPHIES

Jennifer C. Stewart, CFRE – Chief Development Officer



Jennifer Stewart has been a professional fundraiser for almost three decades, including 20 years as president and CEO of Providence Healthcare Foundation. She joined the Arthritis Society as Chief Development Officer in Spring 2020 to lead the national development team.

Jennifer grounds her work in a relentless pursuit of excellence, with a deep understanding of the power of uniting people around a common goal. Among her many achievements at Providence, she guided the completion of the \$28-million campaign to build the Cardinal Ambrozic Houses of Providence and the \$5-million endowment fund that sustains it.

At the Arthritis Society, she directs a clear and compelling fundraising vision, with a goal to raise \$40 million annually through major gifts, events, direct response and planned giving programs to fund the organization's research, advocacy and information solutions for people with arthritis.

Jennifer holds a Certified Fundraising Executive (CFRE) designation and has an honours BA from Western University.

Heather Holmes – Vice President, Quebec



As Vice President, Quebec, Heather is accountable for leading and revitalizing the Arthritis Society's core fundraising activities in the areas of major gifts, foundation grants, corporate partnerships and planned giving across the region. Heather works collaboratively with staff, volunteers and community partners, both provisionally and across Canada, to support revenue development and exceed fundraising targets as the lead fundraiser in Quebec.

Heather joined the Arthritis Society in 2021 from the Lakeshore General Hospital Foundation, where she held the role of Director since 2014. In this capacity, Heather has led fundraising initiatives by managing various major gifts, corporate donors, annual and special campaigns, and relationships with donors; and was responsible for raising between \$2 million and \$5 million per annum. Prior to this, Heather was with AMCAL Family Services as Executive Director, leading a team of 22 in the execution of the non-profit organization's mission and vision.

ORGANIZATIONAL CHART (REVENUE DEVELOPMENT)

