



The Winnipeg Foundation is **For Good. Forever.** We help people give back to our shared community by connecting generous donors with causes they care about **For Good.** We are an endowment-based public foundation, so gifts are pooled and invested, and the annual earnings are distributed back to the community **Forever.** Formed in 1921, we are proud to be the first community foundation in Canada. Our vision is 'a Winnipeg where community life flourishes for all.'

The Foundation is committed to work/life balance and diversity both within the organization and in its work with the community.

We are currently recruiting for the role of
Planned Giving Advisor (Permanent – Full-time)

Our Values

- Trust
- Generosity
- Equity
- Transformation
- Responsiveness

Our Core Competencies

- Relationship Building
- Managing Healthy Conflict
- Active Listening
- Adaptability
- Critical Thinking and Decision Making

The Role:

The position entails the management of an active estate portfolio, which includes the evaluation of prospective estates and the maintenance of communication with estate-related contacts such as lawyers and executors. This role necessitates ongoing assessments utilizing a database to track essential information. The individual in this position will participate in internal meetings to address various estate-related issues and must demonstrate robust problem-solving abilities and meticulous attention to detail. Establishing and nurturing relationships with donors to ensure their engagement and appreciation through regular communications and updates is of utmost importance. Furthermore, the role contributes to the advancement of the planned giving program by collaborating with colleagues to engage both potential and current donors effectively.

Core Areas of Responsibility:

Estate Management

- Act as the first point of contact and ongoing liaison for lawyers and executors working on estate fulfillment
- Manage complexities of active estate portfolio in collaboration with generosity coordinator and provide updates to Manager of Planned Giving
- Manage the timely follow up with estate contact (lawyer/ executors/trust officer)
- Review and assess estate documentation throughout administration while presenting recommendations for internal approvals
- Assess and lead internal approvals process on language of Will and agreement wording
- Guide generosity coordinator on development of estate communication
- Assist with research of materials for executor guidelines and other pertinent projects as needed

Stewardship Management

- Develop and foster current and future donors to explore their generosity goals.
- Maintain professional relationships with lawyers, professional advisors and executors
- Support the stewardship of Planned Giving by assisting with the development of stewardship materials for Recognition Society such as but not limited to the Legacy Newsletter
- Support the planning, implementing and coordination of Planned Giving stewardship program
- Manage the planning and implementation of activities and events that grow the planned giving program
- Maintain a select portfolio including developing relationships with existing donors to ensure they feel valued and appreciated.
- Provide ongoing communications to a portfolio of donors; may include fund updates, thank-you letters, available to spend reports, tax receipt letters and impact reports.
- Demonstrate sensitivity when communicating with family members of deceased donors with a view to establishing new relationships or maintaining existing
- Contribute to the development of stewardship strategies and donor communications, ensuring a coordinated approach with Foundation colleagues.
- Ensure thorough documentation of donor relationships within database.
- Ambassador at The Winnipeg Foundation events

Education and Experience

- Bachelor's degree or college degree related to fundraising, non-profit management or public relations
- CFRE designation an asset
- 3-5 years of experience working in a fundraising or donor engagement environment
- Experience in event planning is an asset

Skills and Abilities

- A sincere commitment to a donor-centric approach, ensuring that donors' needs and goals are the primary focus
- Familiarity with different gift types, including major and planned giving vehicles, is an asset
- A deep passion for philanthropy, the non-profit sector, donor stewardship, and making a positive impact within the community
- A strong work ethic and high level of initiative and reliability. Practice great discretion with sensitive and confidential information
- Exceptional interpersonal, presentational and communication skills, with the ability to convey complex concepts clearly and effectively
- Excellent time management and adaptability skills are essential to this role, with the ability to work independently and collaboratively
- Demonstrate a well-developed sense of empathy, patience, humility and inclusive approaches to engagement within and across communities
- Comfortable working in both a supportive role as well as managing a limited portfolio
- Excellent verbal and written skills
- Proficient with Microsoft Office 365 (Word, Excel, PowerPoint, Teams, and Outlook) and virtual meeting software

What We Offer:

- Starting salary in the range of **\$58,100 - \$69,700**
- A comprehensive benefit package including health and dental benefits
- A Health Spending Account
- Access to Consult + (Virtual Doctor Service)
- EFAP program available to employees and family members
- Pension program starting at six months of employment
- Vacation starting at three weeks per year
- Eco-pass program (half cost bus pass)
- Maternity/Parental Leave Top Up
- Professional Development opportunities

Applications, including resume and cover letter, should be submitted by **April 4, 2025**, All applications must be submitted at <https://careers.risepeople.com/the-winnipeg-foundation/en>.

Applicants who do not fully satisfy all the essential requirements are nonetheless encouraged to submit their applications for consideration regarding this position. We firmly believe in the potential for diverse perspectives, skills and experience to enrich our team and contribute to The Foundation's overall success.

The Recruitment Process

As part of The Foundation's value for being transparent; the following are the stages of our recruitment process:

- Job posting (3 weeks in circulation)
- Phone screening – (conducted after the closing date; duration: 2 weeks)
- First in-person interview (conducted within 2 weeks after phone screening interviews)
- Second in -person interview (within 2 weeks after the first interview)
- Start date: **May 2025**

During the recruitment process, prospective candidates will be expected to provide specific examples of situations where they have demonstrated The Foundation's values and core competencies.

The Winnipeg Foundation is committed to an inclusive, barrier-free environment and will accommodate the needs of applicants under the Accessibility for Manitobans Act (AMA) throughout all stages of the recruitment and selection process. We thank all applicants for their interest; only those advancing in the competition will be contacted. If contacted to participate in the process, please advise if you require accommodation.