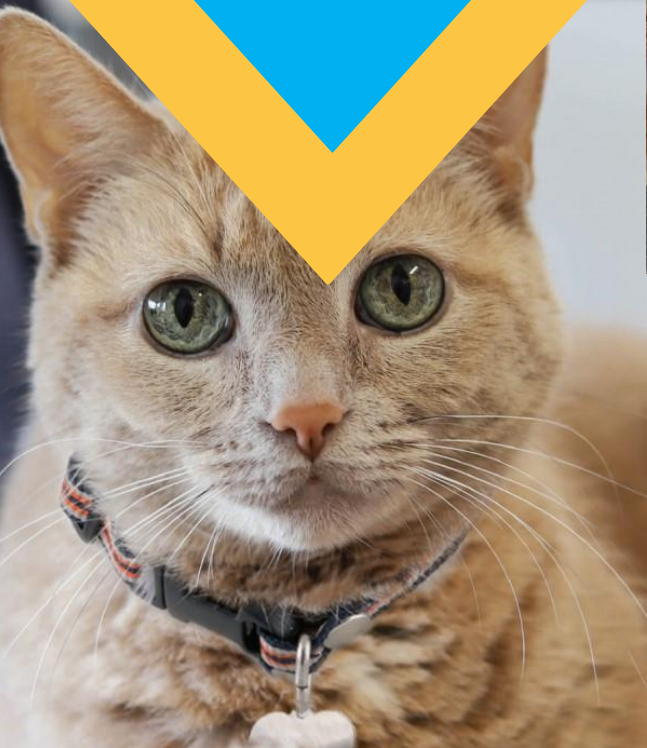


ONTARIO  
**SPCA**

AND HUMANE SOCIETY

**CELEBRATING  
150 YEARS**



**DIRECTOR of LEGACY GIVING**  
**Position Brief**

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## FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of the Ontario SPCA and Humane Society. For more information about this opportunity, please contact Mia Gardiner, Senior Consultant, KCI Search + Talent by email at [OSPCALegacy@kcitalent.com](mailto:OSPCALegacy@kcitalent.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 **October 20, 2023**.**

The Ontario SPCA and Humane Society provide accommodation during all stages of the recruitment process. Should you require any accommodation, or if you have questions, suggestions, or require documents regarding accessibility in a different format please advise Mia Gardiner at KCI Search + Talent and we will work with you to meet your accessibility needs throughout the process.

The starting salary range for this position is \$95,000- \$105,000 plus a full range of benefits.

*The Provincial Office of the Ontario SPCA is in Stouffville and the position is hybrid with in-office days based on what is needed to lead and manage the team and portfolio. This position requires travel and a flexible schedule.*



## **Director, Legacy Giving** **Ontario SPCA and Humane Society**

### **THE OPPORTUNITY**

The Ontario SPCA and Humane Society is seeking a strategic, growth-oriented fundraising professional to provide leadership as the Director of Legacy Giving. This inaugural position will report to the Vice President of Development and will be responsible for leadership of the Society's legacy-giving and estate administration portfolio.

Reporting to the Vice President, Development, the Director of Legacy Giving will manage and grow a significant revenue stream that accounts for nearly half of the revenue at the Ontario SPCA, and will manage the cultivation and stewardship of a large base of legacy suspects, prospects and expectancies. The position will also partner with executors, professional advisors, and other charitable beneficiaries to support the realization of legacy gifts such as bequests, life insurance, annuities, and charitable remainder trusts.

Through developing a strategy that supports the promotion and delivery of communications and events to confirmed future legacy donors, the Director will re-invigorate the Animal Advocate Society Legacy Stewardship Program with the goal of engaging and retaining legacy expectancies. The incumbent will develop the growth strategy for this portfolio oversee its implementation with the support of one direct report and identify future legacy roles needed to support future growth.

The Director of Legacy Giving will be a subject-matter expert on philanthropy and relationship-based fundraising techniques and will collaborate with fundraising and mission delivery teams to encourage and support best practices in philanthropy. The Director will collaborate cross-functionally in a leadership role to achieve the portfolio's goals to generate new and increasing revenue for the Ontario SPCA's strategic funding initiatives.



## ABOUT THE ONTARIO SPCA AND HUMANE SOCIETY



The Ontario SPCA and Humane Society is a registered charity that has been operating for 150 years. The Society provides care, comfort and compassion to animals in need in communities across Ontario. We value all animals and advocate to treat them with respect and kindness.

The Society strives to keep pets and families together and offers a variety of community support services, such as sheltering and adoptions; including emergency sheltering, feral cat management programs, animal transfers, food distribution, humane

education, animal advocacy, and spay/neuter services. The Ontario SPCA does not receive annual government funding and relies on donations to provide programs and services to help animals in need.

### Purpose:

We provide care, comfort, and compassion to animals in need; we value all animals and engage our communities to treat them with respect and kindness.

### Priorities:

- Ensure the best possible support for animals in our care.
- Inspire healthy bonds between pets and people through accessible care, education, and community collaboration.
- Partner to influence and advocate for the welfare of animals in Ontario & beyond.

### Values:

- Compassion
- Transparency
- Excellence
- Collaboration
- Accountability



## Strategic Plan 2023 – 2028

### What the public expects from us: *Deliver Care and Promote Animal Welfare*

- Provide accessible and affordable animal care
- Provide thought leadership and focus on animal welfare
- Ensure effective stewardship of donor support
- Support healthy bonds between pets and people

### What our Communities Expect from us: *Inspire Trust and Loyalty in Our Communities*

- Be a preferred organization for volunteers, employees and donors
- Provide quality animal care and services
- Provide education on health and wellness for animals
- Be the voice for animals in our communities

### Strategic Priorities:

#### Focus on Our Facilities

We will develop a facilities plan to ensure that buildings are safe and reliable for staff and animals in our care.

#### Enhance Community Support

The Society will create community-based services, such as emergency boarding, feeding pets for families in need, and launching a new Humane Education program.

#### Build a Central Ontario Regional Animal Centre

We will design and build a new facility that serves the Central Ontario Region and supports our Northern communities.

#### Develop a Plan for Animal Advocacy

We will collaborate with other organizations in animal welfare, advocating for policy changes and increasing awareness of animal welfare.

#### Enhance Our Impact and Influence In Animal Welfare Through Collaboration

We will consider opportunities to partner and collaborate with other SPCAs and Humane Societies on initiatives that support animal welfare.

#### Northern Outreach

We will partner with like-minded organizations and indigenous communities to provide sustainable resources to the North.

#### Pet Population Management In Our Communities

We will strive to increase access to spay/neuter services to underserved communities.

## FUNDRAISING AT THE ONTARIO SPCA

Over the next five years, the Ontario SPCA and Humane Society is committed to growing donor engagement and philanthropic partnerships in our communities. This comes with a commitment to invest in resources and build on longstanding success with a renewed community fundraising strategy.

Last year with the generous support of a loyal donor base of animal lovers from across Ontario we raised \$15.8 million dollars to support the Society's highest priorities and help keep pets and people together.

Strong relationships with long-standing donors drive revenue at the Ontario SPCA and Humane Society. Legacy donors contribute nearly half of our annual revenue, and our committed monthly donors average a cumulative \$2 million per year in contributions. In addition, corporate partnerships, a host of special and community fundraising events across our 13 animal centre communities, and donations from donor-hosted events are just a few fundraising activities that help make it possible for the Ontario SPCA's volunteers and team members to carry out critical animal wellness programs and services.

## ADDITIONAL INFORMATION

[Ontario SPCA website](#)

[About Ontario SPCA](#)

[2023 – 2028 Strategic Plan](#)

[Financial Statements & Annual Reports](#)

[Leadership Team](#)

[Board of Directors](#)

[How to Help/Donation Information](#)

[Ontario SPCA Services](#)

[Media Releases](#)

## BOARD OF DIRECTORS

**Adam Delle Case**, Chair

**Renata Dinnocenzo**, Vice Chair

**Winnie Tang Broad**, Treasurer

**Krista Slade**

**Sandra Train**

**Shirley Langley**

**Len Butticci**

**Dr. Larry Wilder**

**Meg Houghton**

**Joshua Marando**



## KEY DUTIES AND RESPONSIBILITIES

### Legacy Program Development, Operational Planning and Analysis

- With oversight from the VP, Development, develop the strategy for a robust legacy giving program and moves management activity of legacy suspects, prospects, and expectancies.
- Plan and implement a growth strategy that leverages diverse planned giving vehicles (gifts in wills, life insurance, annuities, trusts, etc.).
- As a subject-matter expert, provide guidance and support to the Development team and Ontario SCPA colleagues as needed on legacy-giving best practices.
- Ensure necessary data capture and reporting processes, communications, recognition, and stewardship policies are developed and in place to effectively support the portfolio.
- Operationalize KPI tracking and reporting functionality for the Legacy program.
- Re-invigorate the Animal Advocate Society Legacy Stewardship Program to engage and retain confirmed legacy expectancies (more than 1,000).
- Maintain current knowledge of legacy and estate administration trends through networking, research, and professional development.
- Lead by example to build excitement and accountability with team members for our goals and the impact our donors enable.

### Legacy Donor Relationship Management and Revenue Generation

- Personally manage a portfolio of legacy expectancies; identify and qualify legacy intenders and prospects, respond to queries through mailings, phone calls, and emails, and conduct personal cultivation and stewardship visits.
- In collaboration with colleagues managing Major Gift relationships, identify legacy intenders with the capacity to make current mid-level and major gifts and work with current expectancies to increase and augment their legacy gifts.
- Work closely with executors, lawyers, and professional advisors to support the confirmation of legacy gifts.
- Maintain and update donor records in Raiser's Edge NXT, including all points of contact.

### Team Leadership and Administration

- Develop and manage one current direct report, an Estate Administration Officer, to implement the plan, monitor and adapt, as required.
- Oversee cross-functional collaboration with the Annual Giving team in the development of mass marketing activities; specifically mail, email and digital lead generation campaigns and other tactics that increase awareness, qualify new legacy prospects, cultivate identified legacy prospects and confirm new expectancies.
- Support the promotion of legacy giving in collaboration with the Marketing and Communications and Annual Giving team through Ontario SCPA internal and external channels.
- Oversee and direct the work of a future Legacy Giving Officer who will implement and manage the program, in addition to managing their pipeline of prospective and confirmed legacy expectancies.
- Oversee and direct the work of the Estate Administration Officer who is responsible for the timely and accurate management and execution of the Society's open estate files (150-250 per year).
- Support, set up and attend meetings and events related to legacy and donor stewardship.
- Conduct detailed reviews of estate files and accounts identifying issues requiring further investigation and inquiry where needed.



- As required, lead interactions on behalf of Ontario SPCA with executors and solicitors for complex estates.
- Ensure estate files are maintained to audit standards for the completion of annual and quarterly bequest status reports, and internal reporting on the status of all open and closed estate files.
- Manage the Legacy Giving program revenue and expense budget.

## QUALIFICATIONS AND COMPETENCIES

- Extensive experience in fundraising, including direct experience in securing legacy gifts through relationship-based fundraising, and building new relationships with prospects, donors and volunteers.
- Experience in legacy giving program leadership, and some experience with mass lead generation campaigns for planned giving.
- Demonstrated experience with promoting and securing gifts of life insurance, annuities, bequests, and charitable remainder trusts.
- Exhibits a high level of maturity and aptitude for working with and understanding the needs and interests of individual donors related to estate planning. Ability to use tact and discretion and maintain confidentiality is mandatory.
- Supervisory, management or leadership experience building and retaining high-performing front-line fundraising teams.
- Demonstrated strategic thinking and leadership skills, initiative, diplomacy, integrity, creativity, judgment, and decision-making.
- Ability to motivate and facilitate the development of others, including direct and indirect reports.
- Strong collaborator who can motivate colleagues to deliver integrated success through effective project management.
- Exceptional interpersonal skills, strong listening skills, empathy, patience, and logic.
- Strong communicator with exceptional written and oral communication,
- Strong organizational skills with the ability to complete multiple tasks with a high volume of work, often with tight deadlines, and keen attention to detail.
- University/College degree, or equivalent combination of education and experience.
- Working knowledge of Raiser's Edge, RE NXT.
- Demonstrated commitment to continuing professional growth and education; member of CAGP an asset.
- Must be able to work onsite at the provincial office in Stouffville and remotely as approved.
- Ability to travel throughout the province and must have a valid driver's license and access to a reliable vehicle for travel.



## LEADERSHIP BIOGRAPHIES

### **Doug Brooks, President and Chief Executive Officer**



Doug Brooks joined the Ontario SPCA and Humane Society in September 2021. He brings to the Society a wealth of knowledge from his early days at Coca-Cola Canada, to leadership roles at CBC Television, NHL Enterprises, Certified General Accountants of Ontario, and the Canadian Marketing Association. Doug's diverse background has allowed him to recognize new opportunities for the Society and lead the Ontario SPCA as it helps more animals in communities across Ontario.

Doug plays an active role in his community, from coaching minor sports to having volunteered at the board level for the Rose of Sharon for York Region and the Finance Committee at Southlake Regional Hospital Foundation. Doug served six years on the Board of Governors at Seneca College as a vice chair and as the finance and audit committee chair.

Doug holds FCPA, FCGA and Chartered Director designations.

### **Stephanie Miller, Vice President, Development**



Stephanie Miller is an accomplished senior fundraising professional. Stephanie brings over 24 years of fundraising experience in community engagement, special events, annual fund, leadership and legacy giving. In her current role as VP, Development, Stephanie is responsible for the leadership, strategic direction and execution of the Ontario SPCA and Humane Society's fundraising activities. Before joining the Ontario SPCA in 2017, Stephanie held various leadership positions with the Canadian Cancer Society and front-line fundraising roles with St. Andrew's College and Markham Stouffville Hospital Foundation.

Stephanie is a Certified Fund-Raising Executive (CFRE) with a passionate commitment to the philanthropic sector. Forward-thinking and focused on giving back, Stephanie takes pride in mentoring new fundraising professionals and is a member of the Board of Directors with the Georgina Community Food Pantry.

## ORGANIZATIONAL CHART

