

## POSITION DESCRIPTION

### Annual Gifts and Stewardship Officer

#### **Purpose of Role:**

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Reporting to the Director of Philanthropy, you are a talented Annual Gifts and Stewardship Officer who is passionate about developing authentic relationships for the good of supporting individuals living with cancer – those diagnosed, caregivers and kids in Calgary and across southern Alberta.

- Collaborate with the Resource Development Team to provide strategic program design in annual and planned giving to maximize philanthropic revenue and contribute to our long-term financial sustainability.
- Create a culture of philanthropy by building awareness of and investment in Wellspring through collaboration amongst all stakeholders.
- Excel at communicating effectively across different channels to engage, inspire and motivate audiences and communities to take action through annual giving activities including direct mail campaigns, recurring gifting, corporate donations, sponsorship, and planned giving.
- Desire to work with a team of exceptionally talented and bright people to make a real difference for those living with cancer to ensure no one has to face cancer alone.

As a member of Wellspring Calgary's Resource Development Team, this role is integral to the success of our fundraising and donor stewardship sustainability.

#### **Responsibilities:**

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- Work independently, and with staff and volunteers as required, the Annual Gifts and Stewardship Officer uses relationship management, administration, marketing and problem-solving skills to enhance the annual and planned giving programs.
- Demonstrates good judgment, attention to detail, and the ability to communicate professionally enable the Officer to build strong relationships with donors, professional advisors and colleagues.
- Proficient at implementing annual fundraising campaigns including planning, project management, overseeing creative and copy development, segmenting data and evaluation.
- Generates income through key projects and channels including direct mail, presentations, proposals, personal visits, donor calls, and social media.
- Assists in the execution of the Wellspring Calgary's development stewardship program, monitor and evaluate donor engagement/cultivation, recognition and stewardship strategies,

including assisting in the development of stewardship reports, gift agreements, thank you letters and creating data queries and providing sound analysis of data queries.

- Upholds and encourages the culture of philanthropy at Wellspring, which includes treating donors professionally throughout all stages of their donation: processing acknowledgment, receipt, and stewardship, with any concerns addressed promptly and courteously.
- Ensure funds are handled securely; donor privacy is maintained, full adherence to all CRA and AGLC laws and regulations, and to Wellspring's donor relations policies.
- Stay up to date with industry and marketing trends and developments to champion innovation across the team and organization.
- Manage all aspects of consultant and supplier relationships. Always ensure a high standard of service from our vendors.
- Proficient use of Raiser's Edge to create reports and develop and use the database to carry out and track activities with donors and prospects and to monitor program results. Is methodical, precise and systems-oriented and diligent in creating and maintaining files (electronic and paper).
- Collaborate with teammates on task completion by efficiently communicating priorities while maintaining flexibility in delivering solutions.
- Other donor portfolio related duties as required.

### **Specific Competencies:**

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#### **Education and Experience:**

- Three to five years directly managing and producing direct response fundraising appeals (including direct mail), donor cultivation, retention, stewardship and planned giving.
- Demonstrated experience and effectiveness with fundraising, planned giving, donor relations, accounting, insurance, financial planning or financial management, and relationship building.
- Demonstrated skills as a pro-active, strategic, goal-oriented fundraising professional with a strong knowledge of fundraising cycles, direct marketing and planned giving best practices across offline and online channels.
- Demonstrated experience leading complex projects with multiple stakeholders and delivering campaigns on time.
- IT: Excellent computer skills including database/information management particularly using in Raiser's Edge, Luminate, Salesforce or equivalent CRM and MS Office 365 applications with high accuracy.
- AFP or CAGP membership considered an asset.

#### **Core competencies:**

- **Communication and Collaboration skills** - Clearly articulates technical information through verbal and written communication, internally and externally, accurately, creatively and persuasively. Ability to work within and contribute to, a team environment.
- **Networking, Personable and Relationship building** - Works collaboratively with internal and external stakeholders, demonstrates and builds strong working relationships in a team. Develops and nurtures long term relationships with donors.
- **Ethics and Integrity** - Demonstrated professionalism, tact and maturity in handling highly sensitive and confidential information ethically and with discretion.
- **Willingness and ability to learn** – Takes initiative to learn about the various ways of making

gifts and the relevant laws related to donations. Life-long learner, open to feedback and a team coaching culture.

- **Planning Skills** – Develops strategic work plans and systems to monitor and track tasks and projects and completes assigned work on time.
- **Critical Thinking and Problem Solving** - tackle complex problems in the workplace using analytical problem solving techniques, creative thinking, effective research and collaboration including asking for assistance as needed.
- **Administrative Acumen** - Exceptional attention to detail, quality assurance, and confidentiality. You are highly organized and hold yourself to high standards of excellence.
- **Curious and caring team player** - You thrive in a busy and information-rich workplace managing to strict deadlines, with flexibility, grace and humour.
- **Extreme passion:** - Your values align with our mission and are committed to donor-centric respectful fundraising.

#### **Personal characteristics**

- Ethical
- Personal integrity
- Strong team orientation
- Compassionate
- Respectful
- Flexible
- Detail Oriented
- Sense of humour

#### **Working Relationships:**

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- Meet regularly with Director of Philanthropy to coordinate development efforts keep leader informed about progress on initiatives to most effectively meet annual giving program needs and goals.
- Work closely with the Resource Development and Communications teams to coordinate campaign timing and execution across all channels while ensuring accurate and consistent messaging and copy.
- Works collaboratively and cross-functionally with all stakeholders to further Wellspring Calgary's vision and mission.
- Provide clear and accurate information to potential donors, the community, other agencies and sponsors regarding the Wellspring's function and current programs.
- Develop and nurture working relationships with the community to expand awareness of Wellspring Calgary.

#### **To Apply:**

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Wellspring Calgary offers competitive salary and benefits and are committed to creating an inclusive work environment. Interested applicants are invited to submit their cover letter with salary expectations and resume by Monday, April 19 or until a successful applicant is selected.

Please contact us at one of the following:



Wellspring Calgary  
1404 Home Road NW  
Calgary, AB  
T3B 1G7

Email: [Janicevc@wellspringcalgary.ca](mailto:Janicevc@wellspringcalgary.ca)  
Subject Line: Annual Gifts Officer – Your Name

Fax: 403-521-5298

This position will remain open until a suitable candidate is found. We thank all applicants for their interest in Wellspring Calgary, however, only those selected for an interview will be contacted. No phone calls, please.

For more information, please visit our website at [www.wellspringcalgary.ca](http://www.wellspringcalgary.ca).