



**Associate Director,  
Major Gifts & Legacy  
Giving**



**POSITION BRIEF**



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### FOR MORE INFORMATION

KCI Search + Talent has been retained to conduct this search on behalf of Cuso International. For more information about this opportunity, please contact Sylvie Battisti, Vice President, KCI Search + Talent or Mona Ip, Senior Search Consultant by email at [Cuso@kcitalent.com](mailto:Cuso@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 **May 21, 2021**.**

Cuso International is an equal opportunity employer and encourages applications from all qualified applicants. Accommodations will be provided at any stage of the hiring process upon request.





## Associate Director, Major Gifts and Legacy Giving

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### THE OPPORTUNITY



Cuso International is seeking a motivated and skilled Associate Director, Major Gifts & Legacy Giving to foster donor engagement and generate revenue growth in support of Cuso's ambitious program goals.

This position will play a critical role in the development and stewardship of current major and legacy gift donors and new major and legacy gift relationships. Drawing on a history of professional fundraising experience, the Associate Director will create opportunities to expand relationships with individual, corporate and foundation donors and identify new prospective donors with an affinity to Cuso International. Fostering a philanthropic culture throughout the organization is integral to

this role. The Associate Director will work closely with and support senior volunteers in major gift development, as well as manage and provide direction to the Fundraising Officer.

Reporting to the Director, Resource Development, the Associate Director, Major Gifts and Legacy Giving will primarily lead the development and stewardship of a portfolio of 100 major donors and prospects, each with the capacity to give \$10,000 plus. In addition, about one quarter of their time will be focused on the implementation of a planned giving program. Areas of responsibility include moves management strategy, research and prospect identification, cultivation, proposal development, solicitation, stewardship and volunteer management. The Associate Director will offer current knowledge and expertise primarily in the area of major gifts as well as some basic knowledge related to planned giving - with an appetite for continued learning.

**This role of Associate Director, Major Gifts and Legacy Giving will enjoy a flexible location anywhere in Canada, close to an airport to facilitate travel. When it is safe to do so, occasional national and international travel for meetings and donor engagement will be required.**

## ABOUT CUSO INTERNATIONAL

**Cuso** is a Canadian charity working globally to end poverty and inequality. We are sharing skills to build stronger futures.

**Our Vision** is a world where all people are able to realize their potential, develop their skills and participate fully in society.

**Our Mission** is to reduce poverty and inequality through the efforts of partners, donors, funders and volunteers.

Cuso was created by a group of Canadian university graduates on June 6, 1961. They had a vision of a more connected world. A world where the social constraints people are born into would not dictate the entirety of their life. These young people took a great leap of faith and rallied hundreds of other young graduates across Canada to join them.

Today, we work with our partners to amplify their impact in their communities to advance gender equality, increase access to education, develop economic opportunities and enhance women and girls' health.

Cuso International's revolutionary tools and strategies, which include placing thousands of skilled volunteers to share their expertise with local partners, means that we are able to create highly strategic responses to development issues, so that communities become stronger and truly own their own development success.

We are now one of Canada's longest serving international development agencies, supporting millions of people living in marginalized communities across Africa, Latin America and the Caribbean. Our tools and strategies are shared around the world. We also share these tools in Canada, where we work with Indigenous peoples to share skills and support their communities.



### Changing People's Lives

Cuso is focused on the long-term. We work with others to create opportunity by delivering resources and sharing the skills needed to thrive. The impact of our work does not stop when our projects come to an end. It continues to grow. Generations of people in more than 100 countries have benefited from training, mentoring and support to hone their abilities. In turn, they become the mentors—training and supporting countless others.

## Areas of Focus

### Empowering Women and Girls

Not only are gender equality and social inclusion human rights issues, but they are also essential to overcoming poverty and its effects. Entire communities benefit when women and girls have the same opportunities to participate freely in society. Our projects in this area align with all three objectives of Canada's Feminist International Assistance Policy (FIAP): enhance the protection and promotion of the human rights of women and girls, increase the participation of women and girls in equal decision making, and give women and girls control over the resources they need to secure economic and social equality. Some examples include:

- Helping Rural communities in Cameroon respond to COVID-19
- Empowering Women Entrepreneurs in Honduras
- Removing the Barriers to Girls' Education in Ethiopia

### Improving Opportunities for Youth

People are more resilient when they have access to well-paid, meaningful employment. We are increasing employment opportunities by collaborating with youth, private sector businesses, governments, civil society organizations and others to create inclusive and sustainable opportunities in the areas of employment, entrepreneurship, natural resources management and food security. Some examples of our projects include:

- Creating opportunities for Young Refugees in Nigeria
- Working with Indigenous Youth in Northern Canada

### Harnessing the Power of Volunteers

Sharing what you know is one of the best ways to address the development needs of our time. That is why for close to 60 years, we've connected communities with skilled volunteers to advance sustainable and lasting change. This approach has benefited millions of people in more than 100 countries around the world while helping to end poverty and build opportunity. Our volunteers are experienced professionals who focus on sharing their skills with our global partners to create long-term change. Some examples include:

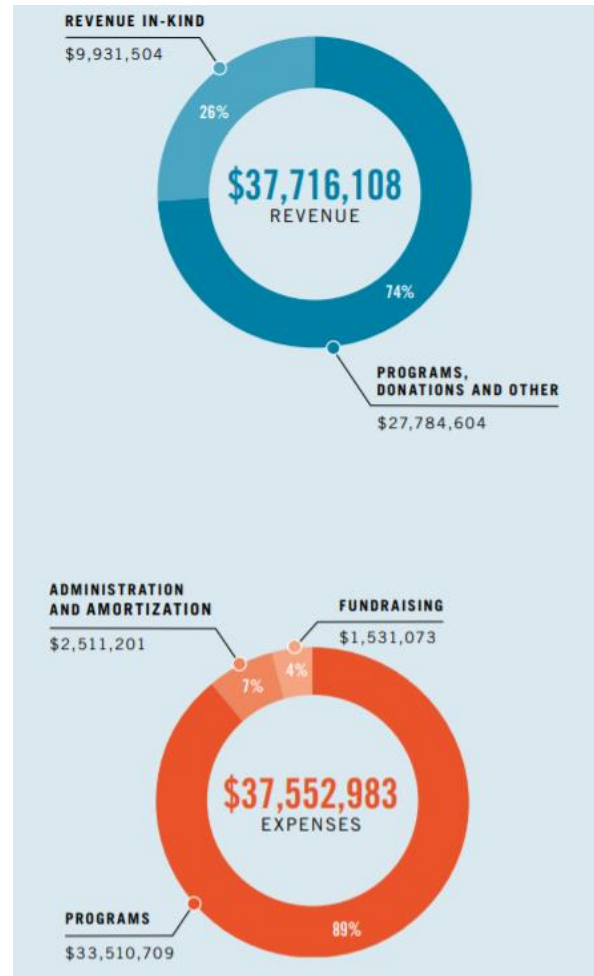
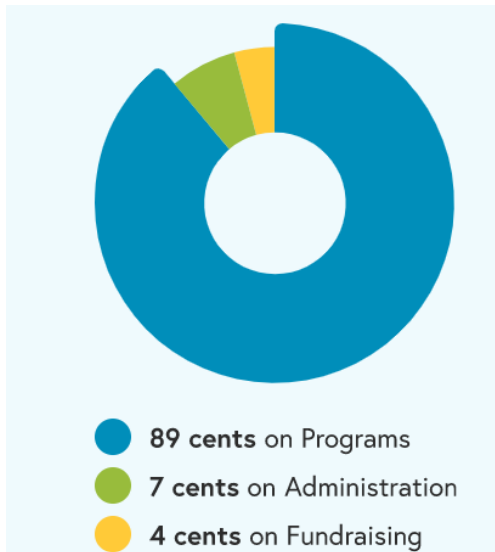
- Tackling Poverty through Canadian Engagement
- Creating Opportunities for Migrants and Victims of Conflict in Columbia



## Funding and Financial Overview

In 2019/20, Cuso developed several new partnerships and enhanced existing ones to advance our programs around the world. Our project funders include:

- CBM International
- European Union
- Global Affairs Canada
- International Rice Research Institute
- Power Corporation of Canada
- Rotary International, District 7070
- Stockholm Environment Institute
- UN Refugee Agency - UNHCR



## BOARD OF DIRECTORS

**Patricia Perez-Coutts**, Chair

**Justin Winchiu**, Treasurer

**Jeff Cates**

**Grant Curtis**

**Lucie Edwards**

**Darrell Gregersen**

**Lynn Graham**, Vice Chair

**Rosemary McCarney**

**Bruce A. McKean**

**Nora Murdock**

**Wayne Robertson**

**Lori Spadorcia**

**Resource Development Committee:** Chair - Jeff Cates, Darrell Gregersen and Lori Spadorcia

## ADDITIONAL INFORMATION

[Our Focus and Work](#)

[Financial Statements](#)

[Annual Report](#)

[Board of Directors Bios](#)

## IDEAL CANDIDATE

The Associate Director, Major Gifts and Legacy Giving will be a results-driven professional who will help raise Cuso International's fundraising achievements to new levels. Working within a highly collaborative team, the ideal candidate will skillfully cultivate internal and external relationships, as an ambassador for philanthropy within and for Cuso International.

With proven major gift expertise, the successful candidate will be responsible for developing and nurturing a recently identified and pre-qualified portfolio of major gift donors, including individuals, corporations and foundations. The new Associate Director will be a talented communicator and influencer, able to position and promote the remarkable success stories and ongoing impacts of Cuso International's programs.

Energetic and hardworking, the new incumbent will pro-actively lead the growth and development of Cuso International's major gifts and legacy giving portfolio and will adapt and thrive in an evolving fast-paced but supportive environment.

Although previous exposure to international development is not required, the successful candidate will ideally be familiar with the complexities of national organizations. Inspired by Cuso International's vision, mission, and demonstrated impact of long-term poverty alleviation, by helping people to acquire tools and skills, the new Associate Director will be a key contributor to the organization's ongoing funding and programming success.

## KEY DUTIES AND RESPONSIBILITIES

### Strategic direction

- Develop and implement sustainable major and legacy gifts programs to meet organizational fundraising goals, moves management objectives, key performance indicators and other measures in collaboration with the Director, Resource Development
- Provide major gift/legacy giving revenue projections and participate in forecasting and budgeting exercises
- Ensure the effective development, management and monitoring of an annual budget for these programs and maintain strict control of all expenditures through performance-to-budget analysis
- Support the Director, Resource Development with the development, implementation, and evaluation of the annual operating plan, department workplan, strategies, policies and procedures



- Develop and implement a multi-year strategic work-plan for the development of Major Gift (individuals and corporate), Legacy Gifts and Foundation Grants
- Document all key development activity using Raiser's Edge as appropriate, with particular emphasis on moves management reports and related cultivation and solicitation activity, and ensure regular progress reports on key performance indicators of all portfolios
- Maintain up-to-date knowledge of major gift and legacy fundraising, including effective solicitation techniques, giving incentives and relevant tax issues
- Manage the work and performance of the Fundraising Officer in line with the Resource Development team's operational plan and provide strategic vision and guidance to develop and deliver core fundraising programs
- Ensure compliance with organizational decisions, policies and procedures within area of responsibility

### **Fundraising leadership**

- Develop and implement strategies and plans for a rolling portfolio of major donor and prospects, including individuals, corporations and foundations, each with the ability to leverage the impact of philanthropy at Cuso International
- Participate in prospect clearance and qualification with the CEO and Director, Resource Development including:
  - Proactively securing meetings with prospects to discuss their links, interests, and opportunities to give
  - Carrying out targeted project and prospect research, and preparing appropriate briefing materials, cases for support, profiles and meeting notes including clear direction on specific next steps with each prospect
  - Developing proposals and financial illustrations for prospects and their advisors
  - Acting as a lead or co-solicitor with volunteers or staff as assigned or required
- Cultivate relationships with current and prospective donors through donor identification, research, proposal development, solicitation and stewardship activities
- Design and implement effective stewardship programs for assigned donors, including relevant events and team projects
- Identify marketing needs for assigned funding priorities and collaborate with communications and marketing to develop materials/collateral and other supports

### **Internal and External Relations**

- Act as the primary relationship contact to a portfolio of major gift donors, corporations, individuals, foundations and coordinate applicable Cuso International departments to ensure stewardship of lead donors
- Provide support to the CEO and Director, Resource Development with senior volunteers through their involvement in the donor journey
- Build relationships with program staff, volunteers and alumni; engage them in Cuso International's philanthropic efforts



- Represent major gifts and legacy giving in cross-departmental working groups
- Maintain in-depth knowledge of Cuso International, program initiatives, and strategic directions within assigned program areas, and act as a key information source within the team
- Undertake specific additional responsibilities or provide support on special projects from time-to-time, as may be agreed upon with the Director, Resource Development

## QUALIFICATIONS & KEY COMPETENCIES

### Experience and Knowledge

- Proven experience in major gift fundraising with a successful track record soliciting and closing gifts of \$10,000 plus from individuals, corporations and foundations
- Experience in legacy giving with basic knowledge of planned giving vehicles and promotional practices
- Superior relationship-building and interpersonal skills to engage internal and external stakeholders. Demonstrated ability to listen, persuade and develop positive relationships with influential or high-net worth individuals
- Experience in engaging and supporting senior level volunteers for major gift development
- Strong understanding of the development of major gifts and legacy giving as well as fundraising principles, ethics and practices and operational budgets
- Prior management experience within a results-oriented team
- Excellent English verbal and writing skills for diverse audiences, including delivering oral presentations to key individuals and groups. French language abilities will be considered an asset
- Excellent time management, planning and organizational skills, and strong attention to detail
- A relevant post-secondary degree or diploma in a related discipline, or an appropriate blend of relevant education, background and experience. CFRE designation will be considered an asset
- Knowledge of Raiser's Edge or other fundraising database systems
- Proficiency with Microsoft applications

### Qualities and Behaviours

- High-level of energy, self-motivation, enthusiasm and initiative
- Sound judgement, professionalism and discretion in dealing with confidential information and key constituents of Cuso International
- Strong and positive work ethic
- Ability to work in a team in a dynamic and evolving environment

## BIOGRAPHIES

### **Laurie Buske – Director, Resource Development**



Passionate about the power of philanthropy, Laurie considers it a privilege to guide donors on their giving journey. She seeks to get beyond the numbers and the actions to share with donors the true impact of their gifts. Laurie has experience in major gift fundraising, capital campaigns, direct marketing and legacy and annual giving. She is adept at managing relationships and campaigns, making sure that an organization's fundraising efforts are invested in for the long term. Over the last 17 years, Laurie has worked for organizations such as the Canadian Parks and Wilderness Society, The Ottawa Hospital Foundation and United Way Ottawa.

### **Patricia Perez-Coutts – Chair, Board of Directors**



Patricia is CFA Senior Vice President and Portfolio Manager, of Westwood Holdings Group, which she joined in 2012. She leads its Emerging Markets strategies and co-leads Global Equity strategy. Prior to joining Westwood, Ms. Perez-Coutts managed emerging markets portfolios for eleven years for AGF Investments Inc. Prior to 2001, she served as Vice President and Portfolio Manager for another Canadian investment management firm, Vice President of Research for a Canadian private merchant bank and Economist for Peru's Institute of Foreign Trade. Ms. Perez-Coutts earned an Honours VBA in Economics from Pontificia Universidad Católica de Perú and a BA in Mathematics for Commerce from York University. She is a member

of the CFA Institute and the Toronto Society of Financial Analysis.

# ORGANIZATIONAL CHART – NORTH AMERICA

