



## **PROJECT MANAGER, FUNDHOLDER ENGAGEMENT**

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**Are you a diligent organizer who loves to improve processes and to keep a team humming? Would you like to contribute to reimagining philanthropy so that it is more equitable and centres the needs of the community? If so, help us to create a more fair and just society where everyone can thrive.**

### **Who We Are**

Toronto Foundation (TF) is a registered charity and one of 191 Community Foundations in Canada. We are home to 900+ community-minded philanthropists and collectively administer \$722 million in charitable assets. Together with our fundholders, we granted over \$33.1 million in 2022 to organizations working to improve the quality of life in Toronto. We are committed to listening, learning, and working in partnership with communities and invite you to join us in tackling the inequities we face in our city.

We are an ideal match if you seek purpose in your work and want to contribute to a small, values-driven team with a strong culture of collaboration.

We believe the greatest ideas come from a diverse mix of minds, backgrounds and experiences, and are committed to cultivating an inclusive work environment. Toronto Foundation actively seeks a diverse applicant pool and encourages candidates of all backgrounds to apply, especially those from marginalized communities.

Toronto Foundation is committed to the principles of the Accessibility for Ontarians with Disabilities Act (AODA). As such, we strive to make our recruitment, assessment and selection processes as accessible as possible and provide accommodations as required for applicants with disabilities.

If you require any accommodations at any point during the application and hiring process, please contact Elizabeth Aquiseto at [eaquiseto@torontofoundation.ca](mailto:eaquiseto@torontofoundation.ca).

## **Who You Are**

As Project Manager your primary responsibility is to organize and optimize the operations of the Fundholder Engagement team. You are meticulous and detail-oriented, with strong project management skills. You are a clear communicator, interacting with many teams across the organization, as well as fundholders and grantees. You are digital and data savvy, adapt quickly to changing priorities, and have strong analytical skills.

As a member of the Fundholder Engagement (FHE) team, this role reports to the Director, Fundholder Engagement. You work closely with the team to provide seamless and strategic customer service to over 900 fundholders through excellent data management and solid procedures. Your closest teammates will be the Manager, FHE who is responsible for growth, relationship management and service for our fundholders; your peer, the Officer, FHE who plays a critical role in relationship management and grant compliance; and the Grant Coordinator, who carries out our most important weekly operations deliverable – grants processing. Other close relationships will be with our Finance team.

Your success in this role will be reflected in your ability to collaborate with team members, thrive in a highly detailed, deadline focused role that requires accuracy and flexibility in handling a number of tasks concurrently.

We strive to create an environment where we work with a growth mindset and engage in process review and improvement regularly. You will be encouraged to contribute to the team's goals and the organization's broader equity priorities. Beyond that we will provide all the supports to ensure you have a workplace that values your voice and enables you to thrive.

## **DUTIES & RESPONSIBILITIES**

### **Operational & Administrative Services - 50%**

- Manages team projects including the coordination of the Annual Report, KPI data reporting, Fund Statement generation etc.
- Monitors and ensures full compliance and fulfillment of Fund Agreement commitments and maintains up-to-date fee structures in the database
- Manages and oversees various fundholder-related reporting requirements with analysis as needed
- Conducts final review of gift entry and tax receipts for accuracy
- Coordinates data validation work for Fundholder Engagement team
- Coordinates annual review and updates to team processes and procedures

- Ensures that all fundholder information is up to date across platforms
- CanadaHelps - creates and updates online donation pages and contributes to issues tracking as needed
- Provides back up for grants process and thank you letters as required
- Works cross-departmentally with the Philanthropic Services, Community Initiatives, Finance, and Marketing/Communications teams

### **Product Management for Fundholder Platforms - Donor Central & FIMS - 30%**

- Manages and oversees continued implementation of all fundholder-facing platforms for the FHE team, including (but not limited to) Donor Central, CanadaHelps, Benevity, etc.
- Team lead on FIMS (TF's database for grantee, fund and fundholder information)
- Maintains business rules and error log
- Manages internal product improvement backlog and coordinates with service provider to implement enhancements to the platforms
- Coordinates support from service provider for non-routine issues
- Key contributor to the Foundation's Digital Transformation Project

### **Fundholder Engagement - 15%**

- Provides direct service and stewardship for fundholders, working with other members of the Foundation team as required.
  - Supports fundholders on Donor Central and CanadaHelps
  - Communicates with fundholders to clarify information around gifting and granting
  - Participates in team projects that require outreach - dormant funds, compliance etc.

### **Other**

- Participates in organizational cross-team projects as a member of the overall TF team.
- Uses TF Project Management system as required.
- Other duties as assigned by the Director, Fundholder Engagement.

## **PROFESSIONAL DEVELOPMENT**

- Attends relevant workshops, conferences and training sessions, and participates in peer opportunities to ensure up-to-date knowledge relevant to best practices for the philanthropic sector.

## **SKILLS, EXPERIENCE AND ATTRIBUTES**

### **Skills and Experience**

- University degree in a related field or equivalent experience
- Related experience in a philanthropic, data management, or relationship management environment
- Excellent proficiency in Excel (e.g. pivot tables, VLookup and formulas) must be demonstrated
- Demonstrated initiative in managing a donor or CRM database
- Proficiency in Microsoft Suite Products (including Word and Powerpoint)

### **Attributes**

- Strong interpersonal skills
- Core customer service focus and superior attention to detail
- Flexible and self-motivated
- Strong project management and organizational skills
- Strong written and verbal communication skills
- Works well independently and as part of a team
- Ability to work effectively with a broad range of stakeholders reflecting the diversity of our city

## **OTHER EMPLOYMENT INFORMATION**

Toronto Foundation is committed to being an inclusive and equitable employer, and to continuously listening and learning from staff. The wages and benefits paid to Toronto Foundation full-time staff exceed the requirements of the Ontario Living Wage Network.

We offer:

- 35-hour work week
- 3 weeks of vacation per year plus 2 float days
- RRSP matching of up to 5% of your base salary
- comprehensive benefits (including medical, dental, life and disability) package

- Employee Assistance Program
- a competitive salary

Toronto Foundation is a hybrid workplace and some in person work is required.

### **SUBMISSION DETAILS**

In lieu of a standard cover letter, please respond to the following question in less than 250 words: **What are 2-3 working experiences that make this role a great fit for your career journey?**

You may submit your response to the question along with your resume in confidence to [resumes@torontofoundation.ca](mailto:resumes@torontofoundation.ca) and include the position title and your name in the subject line of the email (eg. Project Manager, FHE, First Name Last Name).

Please ensure both documents are attached in a single PDF file.

Applications will be assessed on a rolling basis and the posting will close on **October 2, 11:59pm EST.**

### **Compensation Range**

\$60,000 - \$64,000 depending on depth of experience