



Position Profile

Director of Fundholder & Community Engagement

Location: Oakville / Halton Region

Contact

Senior Executive:

Deborah Legrove

Senior Search Consultant / Key Contact: Liz Latimer

Liz@crawfordconnect.com



1.0 Profile of Oakville Community Foundation

Founded in 1994 The Oakville Community Foundation (OCF) is a local charitable solutions provider, delivering the tools to realize charitable passions. The Foundation acts as a philanthropic medium, investing donations to generate new money for the Oakville community and charities. OCF conducts local research to provide its diverse donors with knowledge and solutions to make an impact in the local community, both today and in the future.

Over the past 30 years ago, The Foundation has granted more than \$65 million to support charitable activities. With assets exceeding \$120 million, it grants over \$5 million annually to diverse causes, backed by its commitment to Climate Action and its Reconciliation, Equity and Anti-Racism Statement.

The Oakville Community Foundation believes that the future strength and prosperity of this community starts with long-term investments made today. Its job is to keep an eye on the community's needs and put resources where they are needed.

As a community foundation, we understand Oakville – from the local issues and needs to the agencies doing the best work to address these issues, to the people and organizations who are teaming up to make change possible.

The Foundation has aligned its Strategic Plan to the United Nations Sustainable Development Goals (SDGs) to offer a framework to monitor its progress and that of the local community to “leave no one behind.”

What does the OCF do?

- The Foundation works with all types of donors to help them give back in ways that work for them by offering many opportunities from long term, short term and legacy Donor Advised funds, giving circles, community initiatives and impact investing.
- Its community-based research on current and emerging needs as well as knowledge about the charitable sector helps the Foundation facilitate collaborative solutions with strategic impact.
- OCF is a 360-degree granting organization, meaning it grants to local and national qualified donees to support the entire range of charitable activities (health care, social services, environment, community development, arts, culture, fitness, heritage) and helps its donors support all areas of granting interest.

Vision:

A community Where No One is Left Behind

Purpose:

Building Community Through Philanthropy

Values:

Responsive Leadership • Collaboration • Solutions-Driven
Integrity & Equity

Strategic Plan and Priorities:

1. Community resiliency & charitable sector recovery
2. Location opportunities in education, employment & the social economy
3. Reducing inequities in our operations & in our community

Operational Priorities

1. Leading Local Philanthropic Solutions Provider
2. Employer of Choice

Reconciliation, Equity and Anti-Racism Statement:

Please find our reconciliation, Equity and Anti-Racism Statement on our website,

<https://www.theocf.org/about-us/reconciliation-equity-and-anti-racism-statement/>.

2.0 Oakville Community Foundation Leadership

Wendy Rinella, Chief Executive Officer

Since joining the OCF in 2015, Wendy has championed a refresh to local philanthropy, adopting new technologies, reducing fees, offering new services to fundholders and new community programs.

Wendy's 25+ year career has spanned the public, private and not-for-profit sectors. Prior to joining the Foundation, she served as the Vice President, Corporate Affairs at First Canadian Title launching new corporate divisions and organizations including two industry associations and a charitable foundation from concept to operation. In that capacity she served as President, FCT Charitable Foundation; Vice President & Treasurer, Title Insurance Industry Association; and then, Vice President, Mortgage and Title Insurers Industry Association. Her previous work experience also includes leading an industry association, leading teams in government relations consulting firms, and various positions for a decade at Queen's Park eventually leaving as a Director of Policy. Wendy's career is also marked by her passion for community building, serving on the boards of 15 organizations including Chair of the Oakville Chamber of Commerce and appointments to Crown corporations.

Wendy holds an Honours Bachelor of Arts in Political Science from the University of Waterloo, a Master's of Arts in Political Studies from Queen's University and her Institute for Corporate Directors (ICD) Designation from the Rotman School of Management, University of Toronto. Wendy received the Paul Harris Award from Oakville Rotary clubs in 2021, and the Queen's Platinum Jubilee Award in 2022.

Under Wendy's leadership:

- The Foundation has started investing in charities for a double bottom line return, with 3% of endowed funds targeted for impact investing.
- For 2020, the Foundation was selected as lead Regional Partner to distribute over \$4 million of Federal Government Investment Readiness Program funding for local social enterprises and \$3 million in the Canadian Healthy Community Initiative in 2021.
- Foundation grants to charities have doubled with the introduction of "Crowdfunding" charity granting, GIVEOakville and new community-wide programs.
- Introduced in 2017, Community Classroom provides a local arts, culture & heritage experience to over 30,000 elementary students.
- Since 2020, the Community Education Awards Hub annually offers organizations and thousands of post-secondary bound students a free digitized platform to access and award over +\$300,000 in scholarships and bursaries annually.
- In 2021 in partnership with the Mississaugas of the Credit, the Foundation launched the Debwevin: the Oakville Truth Project to further our shared understanding of Oakville's history and to strengthen community to community reconciliation
- Annually the Foundation releases original research in partnership with local experts on pressing issues in the community.
- In 2023, The Foundation received the Community Builder of the Year Award from the Oakville Business Excellence Awards

3.0 The Position – Overview

Reporting to the CEO, the Director of Fundholder & Community Engagement is a dynamic, results-oriented philanthropy professional. With many external and internal relationships, you will help the organization to be Oakville's leading philanthropic solutions provider. OCF achieves this by being a hub for philanthropic community members and by promoting, connecting and stewarding legacy resources with an unparalleled knowledge of the local charitable sector and conducting original community research.

Major Objectives of the Position:

- Responsible for Fundholder relationship creation and stewardship
- Engages Fund Advisors and donors in support of identified community needs and programs
- Through engagement with the charitable sector in Oakville/Halton, maintains knowledge of current charitable organizations and campaigns
- Oversees and manages Granting & Gift Acceptance Policies, Foundation Programs & Initiatives and related cross-department Teams
- A collegial and supportive Senior Management Team leader with two direct reports

Priorities in the first year:

- Understands the larger needs of the community
- Has built solid and trusting relationships with fundholders and other key stakeholders

The following are in place to support the incoming Director of Fundholder & Community Engagement:

- One of the largest Community Foundations in Canada and a supporting network of peers across Canada's 207 Community Foundations
- A highly collaborative team with longevity
- OCF enjoys a growing and strong community profile
- A 360-degree granting organization that supports charities in all sectors in Oakville/Halton
- Current incumbent to support your transition into the role. Plus weekly staff and senior management meetings to support the integration

4.0 Relationships

Reports to:

- Chief Executive Officer

Key Relationships:

- OCF staff
- Board of Directors
- OCF Committees: Community Legacy Building and the Oakville Youth Education Awards Sub-Committee
- Fundholders
- Local Charitable Organizations and community partners

Direct reports:

Fund Holder and Community Engagement Administrator
Project Manager & Board Liaison (shared report with CEO)

5.0 Specific Responsibilities

Fundholder (FH) Support, Onboarding and Engagement (50% of time)

- Stewards the Fund Holder (FH) relationships by responding to FH questions, concerns and granting – maintain knowledge of FHs and their specific Fund(s).
- Working with FH & Community Engagement Administrator, facilitates the FH granting process.
- Actively engages FHs to support The Foundation's Community Initiatives & Programs.
- Supports the Foundation's goal to be the local philanthropic solutions provider of choice by working with the CEO to respond to referrals and requests on Funds, identify new donors, and philanthropic solutions & opportunities.
- Onboards new FHs from contact, including contract administration, policy explanations, and any other orientation requirements.
- Oversees Fund Agreement contract administration and works with Honourary Solicitor to maintain legal documentation regarding Funds.
- Learns about Fundholder's interests with the goal to match their philanthropic objectives with the community and charity sector.
- Develop and maintain a relationship with Professional Advisors in the community (eg lawyers, accountants and wealth advisors) to further outreach to potential new Fundholders.
- Oversees the Community Concierge Team – Community Concierge is a direct line for Fundholders to a staff member to find the resources they need -and recommends changes as required.
- Works with the Communications Team in developing strategic communication tools to assist in stronger engagement of existing and onboarding of new Fundholders.

Granting and Community Engagement (50% of time)

- Oversees all granting initiatives including Community Foundations Canada (CFC) network led granting programs, community granting programs and fundholder granting, including policies & processes, applications & documents, portals, participation in related research, communications with charities, information sessions, and the facilitation of a related Grants Task Force, as required.
- Works with colleagues and partners to develop strategic solutions to address high priority community needs.
- Provides presentations, recommendations and memos to the Board and its committees on granting initiatives and supports the Community Legacy Building Committee (CLBC) and facilitates the Education Awards Selection Sub-Committee of CLBC.
- Works with Fund Holders to meet their expectations and to achieve the greatest impact from their grantmaking and maximize benefits of Foundation community granting and program initiatives.
- Supports the Communications Team to identify grant stories, new charity initiatives and successes to be shared in media, charity and fundholder communications.
- Oversees processes and teams responsible for The Foundation's Initiatives, including Community Classroom, Community Education Awards Hub, Halton Youth Success, and GIVE Oakville.
- Prepares and provides external presentations to share Foundation knowledge and initiatives.
- Creates great community reputation and maintains relationships with agencies, NFP organizations and the community at large.
- Attends community events in an effort to grow relationships and the profile of the Foundation.

6.0 Qualifications & Experience

Experience:

- Minimum 7 years of increasing responsibility in stewardship, and community engagement preferably in the non-profit sector.
- Familiar with Oakville's charitable landscape. Lives or works in Oakville and is familiar with the evolving needs and changing demographics of the Oakville community.
- An exceptional relationship builder who brings their positive attitude and enthusiasm to volunteers, donors, a charity and/or the local community.
- Strong empathy to work with diverse donors/community members. Is comfortable interacting with people of different backgrounds.
- Demonstrated track record of community building leadership (which may include as a volunteer) and collaborating across sectors including academic, government, NFPs and for-profits.
- A self-starter who is highly customer-service oriented and has demonstrated the ability to address broader issues in local community.
- A problem solver with excellent time management skills.

Education: Post-secondary degree or diploma preferred, or equivalent experience

Assets:

- A second language
- CFRE
- Knowledge of Community Suite by Foundant and familiarity with Google programs
- Financial literacy and understanding of foundation business model & granting and is familiar with CRA charity rules; tax receipting, endowments, etc.

Why consider working with Oakville Community Foundation? What OCF offers you?

- A competitive salary range of \$125k - \$135k plus a pay for performance component.
- Strong healthcare benefits including health, Rx drugs, dental
- A culture of professional and caring staff who are motivated, innovative, and creative
- Opportunity to be part of a strong leadership team
- Paid Professional Development
- At one year of service, an employer matched RRSP of 5% to provider of your choice
- Flexible hybrid work schedule
- Previous incumbent support in onboarding and transitioning
- Generous vacation of 4 weeks to start
- Participate as a member of the Senior Leadership Team

7.0 Application Information

This search is being conducted on behalf of OCF by *crawfordconnect*, a search firm specializing in recruiting non-profit & charitable professionals for Canada's non-profit sector. If someone you know may be interested in this position, please feel free to forward this information – we would be pleased to connect with them. **For additional information, please reach out to Liz Latimer at Liz@crawfordconnect.com.**

We request all applications be submitted online only.

Qualified applicants are invited to submit their resume and letter of interest (cover letter) in two separate documents (online only), in confidence.

To apply and submit your application by August 12, 2024, please visit <https://crawfordconnect.com/for-candidates/job-openings/#/posting/PR-291>. Issues applying? Contact info@crawfordconnect.com.

We thank all applicants for applying, however, only qualified candidates selected for an interview will be contacted.



Selection Process

1. Declare your Candidacy

If you are interested in this position, please forward your resume and relevant material per the instructions above.

2. Review of Credentials

When we receive your expression of interest, we review your background, experience against our client's needs and other candidates.

3. Introductory Interviews and Due Diligence

Should your background and experience meet our client's requirements, we will invite you to come in for a personal interview. It is during this interview that we will ask more about your experiences, skills, working style and to give you the opportunity to learn more about our client. Our goal is to look for a fit and interest from both parties. We would ask you to take some time to consider this position, the geographic location, the compensation and the cultural fit with the organization. Please come prepared to discuss what you need in an organization to help you thrive.

4. Presenting Credentials

Once we have done our due diligence and have made the decision as to which candidates fit best with our client's requirements, we present our client with the candidates' credentials. Our client then determines who they will interview. We will follow up with you immediately on this outcome.

5. Client Interviews

If you are chosen for an interview, we will support you by providing additional information to help prepare you, outlining expectations and providing you the profile of the members of the Interview Panel. Selected candidates may be asked to complete an online psychometric test to help inform alignment with the position.

If you are not chosen to move forward, we will advise you immediately and provide you with feedback as to the rationale for this decision. We do our utmost to protect the confidentiality of your candidacy throughout the search and we ask our client to do the same.

6. Final phase

Once the final round of interviews is complete, we will inform you as soon as possible as to the status of your candidacy. If you are the finalist, you will be made an offer that is contingent upon the completion of your references. We will at this time ask for your final references which will include a combination of direct reports, colleagues/volunteers or board members and managers to whom you have reported.

8.0 Dates to note in your Calendar:

| | |
|--|-----------------|
| Deadline for applications: | August 12, 2024 |
| Interviews with <i>crawfordconnect</i> : | ongoing |
| Interviews with OCF targeted for: | late-August |
| Ideal start date: | September |

Offer Etiquette

If this position is offered to you, we would like to know that you will honor two standards of professionalism:

1. We ask that you treat the offer in confidence (except family) and that you do not 'shop' the offer with your current employer.
2. We also ask that if you accept the offer, you will honour your commitment. We understand that candidates sometimes have doubts after making a significant decision like a career change, however these feelings are normal. Prepare and anticipate that this may happen.

If these conditions are not acceptable to you, please advise us.

Resume Integrity

Please know that *crawfordconnect* verifies the contents of resumes and if inaccuracies are found, we will discontinue the candidacy.



9.0 Organizational Chart

Leadership and Board Chart - 2024

