



ASSOCIATE DIRECTOR, PHILANTHROPY



Position Brief



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FOR MORE INFORMATION

KCI (Ketchum Canada Inc.) has been retained to conduct this search on behalf of Rise. For more information about this opportunity, please contact Jill Anderson, or Mia Gardiner, KCI Search + Talent at rise@kcitalent.com.

Interested candidates are invited to send a resume and letter of interest to the email address listed above by **Monday, January 15, 2024**. All inquiries and applications will be held in strict confidence.

Rise is committed to inclusion, equity and diversity in the workplace. ***We actively seek racialized and Indigenous persons, people with disabilities, (including people who have experienced mental health and addiction challenges), and additional diverse identities, for our team.*** All applicants are advised that, where needed, accommodation for disabilities will be provided upon request to the Search Consultant. This includes accommodation throughout the recruitment process.

This position will serve as a member of the Rise team headquartered in Toronto at 2 Carlton Street, Suite 1806. More important than location is finding the right person for the job, therefore, we are open to candidates from across Canada who could fill this position remotely with travel to Toronto from time to time. If the new Associate Director, Philanthropy is within commutable distance to Rise headquarters in Toronto, they will be expected to be in the office two days per week.





Associate Director, Philanthropy

THE OPPORTUNITY

The Associate Director, Philanthropy will join Rise at an exciting time of growth for the organization and will be responsible for developing and growing the national major gift fundraising portfolio. This is a unique opportunity for a driven and results-oriented fundraiser to play a key role in a growing organization that empowers people with mental health and addiction challenges to achieve greater social and economic inclusion through entrepreneurship.

Reporting to the Director of Development and working closely with the CEO, the Associate Director will build and execute strategic cultivation and solicitation plans for major gift prospects, respectfully managing each prospective donor through the major giving process and deepening their engagement with the organization.



As a skillful, highly motivated and focused fundraiser, the Associate Director will be adept at planning, pipeline development and creating personalized engagement strategies. They will also bring strong relationship development and solicitation skills.



Rise is an entrepreneurial and high-achieving organization with a collaborative, supportive team that is excited to be growing through the addition of this new role.

With the incredible momentum of the past two years, the Associate Director will be joining Rise as they embark on an exciting journey focused on exponential growth to their programs that will achieve greater impact through both fundraising efforts and social finance.

The salary range for this position is \$80,000 - \$95,000 plus generous benefits, employee assistance program services, holiday closure and paid sick leave.



ABOUT RISE

Empowering People. Launching Ideas.

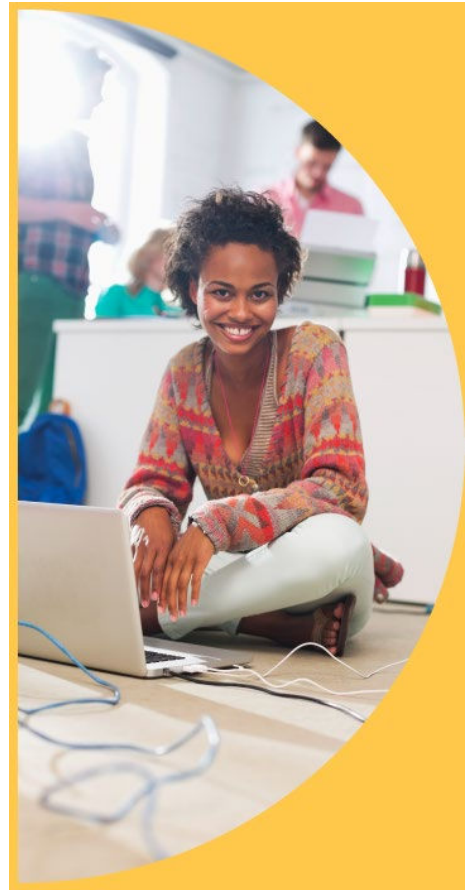
Rise is a national organization dedicated to empowering people with mental health and addiction challenges to achieve greater social and economic inclusion through entrepreneurship.

Why? Because mental health significantly impacts Canadians' financial and social well-being. In any given year, one in five Canadians will experience a mental health or addiction challenge. Amongst the population of people with disabilities, those with a mental illness face the highest degree of stigmatization in the workplace and the greatest barriers to employment (CAMH).

Entrepreneurship is a powerful catalyst to change that.

Through training, mentorship, micro-financing and other custom supports, Rise helps individuals build the skills and access the capital they need to launch a small business that can improve quality of life and enable them to support themselves, their families and communities.

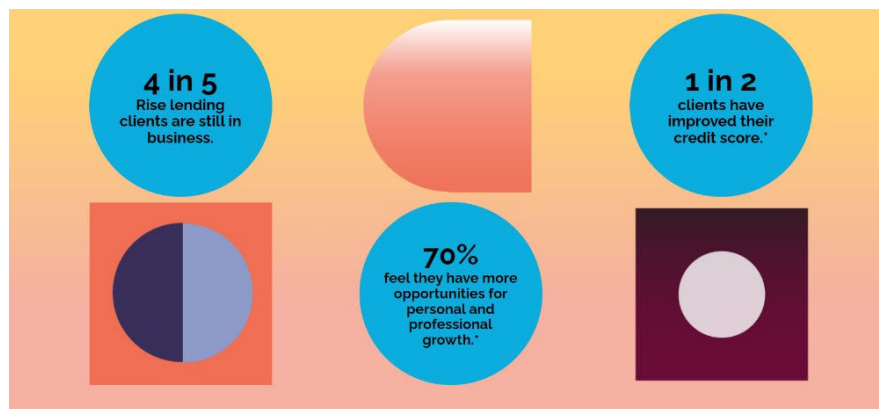
Since 2010, Rise has financed, trained, mentored, and coached more than 2,000 entrepreneurs and disbursed more than \$3 million via 800+ low-interest loans. What Rise does works, as a recent client survey shows that 4 out of 5 Rise clients are still operating a business after 5 years.



The impact is undeniable.

As detailed in the Rise 2023 Social Impact Results:

- 84% of clients say they take steps to learn from every experience, regardless of success or failure, and 75% say they are more confident in making business decisions.
- 28% of clients say they've required less provincial income support over the last 12 months.
- Compared to 2021 survey results 9% more clients believe that their business has helped them overcome some of others' biases around mental illness.



Together, we are changing lives and strengthening communities by unleashing the entrepreneurial spirit of all Canadians with mental health and addiction challenges.

Having even greater impact.

Capitalizing on our unique position as Canada's only national organization working at the intersection of mental health and entrepreneurship, in 2021, Rise launched an ambitious three-year Strategic Plan. A major goal of this plan, which ends in April 2024, is for Rise to be disbursing 125 loans per year. Currently, on track to meet this goal, we believe that we have an opportunity to have an even greater impact. At a macro level, the current environment in Canada is ripe for Rise to excel:

- Canadians' mental health continues to be negatively impacted by the COVID-19 global pandemic.
- Self-employment and entrepreneurship rates are growing.
- Demand for the Rise Small Business Lending Program is at an all-time high.

We have developed a financial model to grow to 300 loans per year by the end of a five-year period. To achieve this growth, we need to build a sustainable pool of loan capital. In exploring new financing options to achieve the issuance of 300 loans per year, the Rise Board and Leadership Team have decided to pursue Social Finance (financing opportunities that create social impact as well as offer economic value for investors) in addition to philanthropy.



Mission

Rise empowers Canadians with mental health and addiction challenges to achieve greater economic and social inclusion through entrepreneurship training, small business loans and custom supports.

Vision

Strengthening communities by unleashing the entrepreneurial spirit of all Canadians with mental health and addiction challenges.

Values

- Care
- Empowerment
- Inclusion

ADDITIONAL INFORMATION

- [About Rise](#)
- [Rise Above: Strategic Plan 2021-2023](#)
- [2022 – 2023 Impact Report](#)
- [2021 – 2022 Impact Report](#)
- [2023 Social Impact Results](#)
- [News and Media](#)
- [Impact Stories](#)
- [Programs](#)

KEY DUTIES & RESPONSIBILITIES

- Actively manage a portfolio of prospects and donors (individuals, corporations and foundations) to qualify, cultivate and solicit gifts at the \$10,000+ level with a focus on building and maintaining long-term relationships, personally conducting discovery meetings, cultivation visits, solicitation calls and stewardship activities.
- Support the CEO to develop strategic engagement plans for donors \$100k+.
- Work in collaboration with, and in support of, the CEO and Director of Development on strategy and planning related to major gift prospect development and activities with fundraising volunteers, including the Fundraising Committee.
- Further develop the prospect pipeline and prospect engagement strategies for potential donors.
- Participate in and contribute to development team meetings, including solicitation strategy sessions for key prospects and internal planning efforts.
- Assess current donor strategies and develop elements to attract new donors and to upgrade current donor giving.
- Plan and implement major gift cultivation events and participate in broader organizational event planning by bringing a strategic perspective, using events to deepen relationships with prospective and existing donors.
- Prepare documentation and correspondence to support major gift fundraising initiatives (e.g. briefing documents, cover letters, follow-up correspondence, proposals, stewardship reports and other communications materials).
- Ensure accuracy in keeping the database up to date on your activities, opportunities and prospect strategies.
- Participate as an active member of the Rise team, working collaboratively with colleagues towards common goals.



QUALIFICATIONS & COMPETENCIES

- A proven track record identifying, cultivating, soliciting and stewarding major gifts (\$10,000+) and developing personalized proposals appropriate to the size of the gift and the needs of the prospective donor.
- Ability to collaborate effectively with leadership, colleagues and volunteers, supporting them in the identification of potential donors, and in the planning of major gift fundraising, cultivation and solicitation.
- Previous experience engaging and inspiring volunteers in the major gift fundraising process.
- Strong knowledge of theories, principles and best practices of major gift fundraising and initiatives in a not-for-profit setting.
- Experience cultivating and soliciting planned gifts would be considered an asset.
- Exceptional ability to network and build relationships with a variety of diverse audiences.
- Strategic thinker with the ability to connect high-level priorities to practical day-to-day objectives.
- Displays creativity, ingenuity, and tenacity in developing strategic approaches for prospects.

- Ability to assess current fundraising strategy, identify opportunities for improvement, and recommend changes.
- Skilled at connecting high-level institutional priorities to practical and efficient day-to-day objectives.
- Excellent oral and written communication skills with the ability to clearly present cases for support and effectively report on the impact of gifts.
- Demonstrated commitment to ensuring fundraising practices promote the ethical management of donor information and gifts.
- Knowledge of project management principles, processes and best practices.
- Skillful at managing multiple, and sometimes competing priorities within a complex environment.
- Excellent computer skills including MS Office applications, especially Word, Excel, and PowerPoint.
- Ability to input and extract information from a database for donor prospecting and tracking is required.
- Willingness to work outside of regular business hours from time to time, and travel across Canada as necessary.

BOARD OF DIRECTORS

- **Tamara Bahry** – Director
- **Boafoa Kwamena** – Secretary, Chair, Governance & Nominating Committee
- **Tom Little** – Director
- **Raksha Manaktala Bhayana** – Director
- **Nikki Moffat** – Director
- **Philippe Savoy** – Treasurer, Chair, Finance, Audit & Risk Committee
- **Lori Spadorcia** – Chair
- **Tassan Sung** – Director



LEADERSHIP BIOGRAPHIES



Lori Smith, Chief Executive Officer

Lori Smith is a Canadian non-profit leader deeply committed to building and strengthening organizations that positively impact people's lives in their communities and beyond. An innovative strategist and highly experienced fundraiser, Lori has spent more than 25 years supporting charities in the health, mental health, international development and arts sectors to deliver quality, high-impact programming.

Lori joined Rise as CEO in 2018. In the years since, she has led the organization through significant growth and under Lori's leadership, Rise has more than tripled its revenue and increased the total value of its loans disbursed from \$1 million in 2018 to over \$3 million in 2023. To date, Rise has helped to empower 2,000+ individuals with mental health and addiction challenges from coast to coast as entrepreneurs.

Before joining Rise, Lori served as the National Director of Right to Play Canada and as Associate Vice-President of Development at the Centre for Addiction and Mental Health (CAMH).



Erin Burgess, Director of Development

Erin Burgess is an authentic fundraising leader with 20 years of fundraising experience in special events, community engagement and relationship building. As Director of Development at Rise, Erin is responsible for the Development team's leadership, strategy, and financial and operational management. Erin joined Rise in 2018 and has grown into progressively senior roles during that time.

Prior to joining Rise, Erin spent 14 years at The Canadian Women's Foundation, with her most recent position as Manager of Special Events, leading the strategic direction of events in collaboration with the Senior Leadership Team.

Over the past 20 years, Erin has managed, coached and mentored senior volunteers, donors, staff and members of the Board of Directors, while focusing on revenue growth for the causes she has championed.

ORGANIZATIONAL CHART

