



Associate Officer – Planned and Major Giving

Position Purpose

Reporting to the Executive Director. Representing Donor Relations, you will be a point of contact for Canadian Council of the Blind donors and supports, providing excellent customer service by phone, email and mail. You will be assisting with gift fulfillment, including intake, processing, database management and receipting/acknowledgement. You will also carry out donor cultivation activities to enhance the donor experience and foster long-term engagement.

Responsibilities

- Develop and propose strategies for the cultivation and solicitation of planned and major giving prospects and donors; recommends policies, standards and procedures.
- Manages estate administration matters, consulting with Senior Management as necessary.
- Gift entry/processing for planned gifts including bequests, current gifts, securities, insurance, trusts, RRSPs, TFSAs, foundation grants and other gift vehicles.
- Ensures planned and major gift donors are provided with appropriate recognition and stewardship through planning and implementation.
- Manages the mid-level giving program, identifying, cultivating and soliciting prospects who may be candidates for significant five figure gifts.
- Maintains information of activities, donors, and prospects using both paper files and Microsoft Dynamics - our CRM program.
- Maintains current knowledge of best practices and evolving trends in philanthropy through professional networking and training.

Experience and Qualifications

Required Criteria

- Demonstrated ability to interact comfortably, tactfully and effectively with donors as well as internal and external stakeholders
- Experienced in handling sensitive and confidential situations directly. This includes the emotional intelligence and maturity to handle end-of-life stage conversations with sensitivity as well as a genuine desire to know the unique story behind each gift.
- High attention to detail and initiative
- Must possess the ability to think strategically, work independently and as a member of a team
- Excellent communication skills (both written and verbal) and well developed interpersonal skills, in English/ French is considered an asset
- Excellent organizational and administrative skills
- Excellent proficiency in Excel and Word
- Demonstrated commitment to exceptional customer service and a pleasant phone manner
- Ability and willingness to obtain a vulnerable sector police reference check as a condition of employment
- Demonstrated Commitment to volunteerism or volunteer sector
- Keen desire to learn and develop skills

Advantageous Criteria

- University degree or diploma or commensurate work experience
- CAGP Gift Planning Fundamentals
- Some experience in planned giving and/or major gift fundraising.
- Some knowledge of estate planning, including wills and trusts, as well as general knowledge of income, estate and gift tax laws.
- Knowledge of donation and receipting processing and CRA regulations is an asset

Particular Working Conditions

- The position involves some evening and weekend commitments, and is eligible for overtime under our Lieu Time Policy.
- In consideration of the population the organization serves, it is preferred that the applicant is a non-smoker.

Skills and aptitudes

- Excellent communication skills, both oral and written, in English/ French is considered an asset;
- Strong interpersonal skills and the ability to exercise tact, discretion and judgement at all times
- Curiosity and willingness to always be learning.
- Proven administrative skills and an organized approach with an ability to prioritize and effectively handle many demands.
- Capacity to work in a self-directed manner and demonstrated ability to work well within a team setting
- Strong computer skills including word-processing, team-collaboration tools, communications, spreadsheet and database software

Salary - \$38,000 – 42,000