



JOB DESCRIPTION

(1) TITLE: PLANNED GIVING OFFICER – CENTRAIDE FOUNDATION

(2) POSITION SUMMARY

Under the direction of the Director of the Major Donors Department, the Planned Giving Officer is responsible for the planning, implementation and evaluation of the Planned Giving Program's awareness and fundraising activities.

(3) PRIMARY DUTIES AND RESPONSIBILITIES

1. Ensures the development and promotion of a planned giving program.
2. Develops an annual action plan for the planned giving program, ensures its implementation and evaluates its impact.
3. Provides expert advice on planned giving to donors, volunteers and colleagues.
4. Works in close collaboration with members of the Board of Directors of the Centraide Foundation, volunteers and staff of the Major Donors Department, providing them with the necessary technical support to carry out their work in the area of planned giving development.
5. Establishes a network of contacts with various professionals and associations, and works in consultation with tax and estate planning professionals.
6. Identifies new opportunities for soliciting planned gifts and for developing relationships with donors.
7. Ensures communication with donors and volunteers, either by direct contact, by telephone or by mail.
8. Prepares reports and analyses as required for distribution at meetings of the Foundation Board.
9. Maintains a database in Raiser's Edge for all planned giving donors and prospects.
10. Plans, coordinates and organizes the soliciting of Major Donors and foundations within the framework of the annual campaign.
11. Executes the administrative duties of the position.

The above list is a summary of the duties and responsibilities of the position and is not a comprehensive list of all the tasks that could be performed.

(4) ESSENTIAL QUALIFICATIONS

- Bachelor's degree in a relevant field.
- Five years of demonstrated success in developing planned giving programs. Additional experience in a related field, such as estate planning, tax and financial planning or law would be an asset.
- Spirit of initiative, creativity, independence and sense of organization.
- Strong communication skills, public relations and interpersonal skills, and ability to work independently as well as in a team.
- Ability to treat information ethically, accurately and confidentially.
- Excellent written and oral communication and interpersonal skills.
- Bilingualism is essential.

Desirable assets

- Member of the Canadian Association of Gift Planners (CAGP), the Fiscal Financial Planning Association (APFF) or the Association of Fundraising Professionals (AFP).
- Certified Fund Raising Executive (CFRE).
- Knowledge of Raiser's Edge software.

If you are interested, please send your resume before February 12, 2010 to :



CENTRAIDE OF GREATER MONTRÉAL
Human Resources Department
493 Sherbrooke Street West
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E-Mail: smorrisseau@centraide-mtl.org

Only those people for an interview will be contacted.