



Position Profile

Position Title: Manager, Planned Giving
Location: Toronto, ON
Reports To: Senior Advisor, Philanthropy
Date: January 2019

Life is a beautiful, complex and a wonderful thing. Life for people who are blind should be no different. To deliver on this vision and help us change what it is to be blind today, CNIB (the Canadian National Institute for the Blind) is inviting applications for spirited, determined leaders to join our team.

For 100 years, CNIB has been the leading national organization serving and supporting people with sight loss and, as we enter our next century of service, we want to take our work to the next level and smash societal barriers and stigmas associated to sight loss.

We offer flexible work schedules, competitive compensation, comprehensive benefits, and opportunities to make an impact. Be a part of a collaborative and enthusiastic group of people whose shared vision is to change what it is to be blind.

Essential Functions

This position entails, but is not limited to the following general responsibilities:

- Provides direct support to the Senior Advisor, Philanthropy.
- Build, plan, manage and implement the Planned Giving Program across the defined territory.
- Identify, cultivate, solicit and close planned gifts from individuals from a prospect and donor portfolio.
- Prepare customized funding proposals, agreements and gift scenarios involving cash, securities, annuities and other planned gift vehicles in order to meet the donor's personal, estate and financial planning goals.

- Advise prospects, donors, senior volunteers, staff and allied professionals on strategic moves, opportunities and process.
- Deals directly with professional advisors. (i.e., Life Insurance agents, brokers, etc) when called upon by donors to assist in the creation of Planned Gifts.
- Assists in the assessment of the Planned Giving Program.
- Assists in the implementation of the Planned Giving Program with the support of the Senior Advisor, Philanthropy.
- Coordinates the necessary approvals and signatures on planned giving documentation and forwards as required to identified allied professionals, staff and donors related to their assigned prospects.
- Handles, prepares, distributes and provides follow-up on matters relating to planned gift acceptance, receipting, processing and administration related to planned giving prospects.
- Ensures that donor and prospect information related to their assigned prospects is updated weekly in the CNIB RE data base.
- Acts as part of the CNIB Planned Giving Team and provides input into strategic and marketing initiatives.
- Completes special projects as assigned by the Senior Advisor, Philanthropy.
- Achieves budget targets

Qualifications

Knowledge and Skill Requirements

- Excellent organization, prioritization, judgment, and problem-solving skills.
- Ability to communicate with all levels of the organization.
- Strong problem-solving skills and excellent attention to detail.
- High degree of organization and initiative.
- Complete respect for confidentiality.
- Strong team player.

Experience and Education

- BA/BS required
- Must have an understanding of Planned Giving.
- Previous development experience and/or a background in a non-profit are an asset.
- Planned Giving training (e.g. CAGP Banff course) is an asset
- Experience with fundraising database (Raiser's Edge experience is an asset).
- Proficient in Microsoft 365.

Work Environment

- Willingness to work flexible hours when required
- Occasional travel may be required.

Application and contact information

CNIB strives to establish and maintain an inclusive workplace and believes that the diversity of our workforce is an invaluable asset. CNIB is committed to following recruitment and selection practices based on merit, transparency, accessibility and inclusion ensuring that all candidates are given a fair opportunity for employment with CNIB.

To help ensure that this commitment is met, CNIB is committed to working with all candidates that require an accommodation. If you require an accommodation, please let us know what accommodation you require and CNIB will work with you to meet your needs at every stage of the recruitment and selection process.

For more information or to submit your resume, please contact Cindi.Meyer@cnib.ca

Please send cover letter and resume, and mention how you learned of this position.

Please note that the successful candidate will be required to pass a standard Criminal Record Check.

We thank all applicants for their interest in CNIB, however, only those selected for an interview will be contacted.