



JOB PROFILE

JOB TITLE: PLANNED GIVING OFFICER	
REPORTS TO:	MANAGER OF MAJOR GIFTS
DEPARTMENT:	DEVELOPMENT
JOB LEVEL:	NON-MANAGEMENT
Core Purpose and Mission Statement	
<p>The Core Purpose of The Ottawa Mission is to reflect Jesus' love in serving the homeless, the hungry, and the lost.</p> <p>Our Mission is to provide food, shelter, clothing and skills, and offer healing, faith and hope for building a wholesome life.</p>	
Vision & Values	
<p>Our Vision is that all the hurting, hungry & lost in Ottawa find HOPE, HEALING & HOME</p> <p>Our Values are Faith First, Excellence in All, Respect & Dignity</p>	
Position Purpose	
<p>The Development Team is a high-performance, fully-diversified fundraising department generating over \$11M annually to support life-changing programs at The Ottawa Mission. We are supported by the commitment and generosity of more than 1,000 volunteers and 35,000 donors.</p> <p>Reporting to, and working closely with, the Manager of Major Gifts, the Planned Giving Officer will work with other staff members, the leadership team and members of the Board of Directors to initiate, plan and manage the planned giving program including donor research, qualification, cultivation, solicitation and stewardship.</p>	
Major Responsibilities	
<p>Major Responsibilities</p> <ul style="list-style-type: none"> • Hold primary responsibility for bequests, gifts of life insurance, trusts, and various other vehicles that reflect financial planning and deferred giving opportunities. • Develop and implement a broad based legacy campaign to build a pipeline of new expectancies. • Build and manage a portfolio of approximately 280-320 planned giving prospects to cultivate, solicit and secure gift expectancies for legacy gifts and blended gifts. • Lead stewardship activities for current legacy society members. • Manage the internal process for estate gift administration and lead stewardship activities with estate trustees and/or family as required. • Develop appropriate marketing tools and materials to support planned giving activities. • Develop relationships with consultants and allied professionals to benefit the program. • Monitor sector trends and information relevant to planned giving to establish industry-leading best practices. • Participate in relevant industry conversations (e.g. social media and webinars) and associations (e.g. CAGP and AFP) to represent The Ottawa Mission as a thought leader in the sector. • Collaborate with the Major Gifts Officer and other staff members and volunteers to put forward dual asks. • Lead the development of the planned giving business plan and budget and conduct annual goal setting. 	

ACCOMMODATION IS AVAILABLE, UPON REQUEST, FOR ALL EMPLOYEES WITH DISABILITIES

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- Create and monitor personal work plan and the monthly review process of progress against plan, and suggest modifications when necessary in order to meet personal targets.
- Meticulously employ the CRM database (Raiser's Edge) for tracking and cultivating donors and prospects and contribute to the organization's planned giving tracking and activity reporting.
- Pro-actively model a donor-centered approach and help to advance a culture of philanthropy throughout the organization.

Other Requirements

Education:

- University Degree in a related field or the equivalent combination of education, training and experience.

Experience & Qualifications:

- Minimum 5 years of progressive experience in fundraising with a proven track record of pipeline management, solicitation and closing gifts.
- Creative, flexible and organized professional with demonstrated team-based fundraising success.
- Outstanding written communication skills and demonstrated success at persuasive writing.
- Self-starter with the ability to think strategically, work independently, and manage competing priorities in a high-volume and results oriented environment.
- Outstanding relationship builder and networker.
- Ability to passionately articulate key messages and demonstrate a deep understanding of The Ottawa Mission and the issues surrounding homelessness in our community.
- Ability to be a positive influence throughout the organization, fostering a commitment to teamwork and building a climate of philanthropy, professionalism, openness and communication.
- Excellent organization, planning and time management skills.
- Exacting attention to detail.
- Experience using Raiser's Edge CRM software an asset.
- Advanced level of proficiency in MS Office applications.
- Willingness to work occasional evenings and weekends.
- A commitment to the values and vision of The Ottawa Mission.
- Must have a valid driver's license with a clean abstract.
- Bilingualism (English/French) considered an asset.
- CFRE designation considered an asset.

Working Conditions:

- Must work to, sometimes strident, deadlines, manage and respond to competing priorities;
- Intermittent physical activity including walking, standing, sitting, and lifting;
- Primarily Office Setting;
- Travelling by car throughout the city;
- Interacts with employees, donors and the community at large.

The salary range for this position is \$58,500 - \$68,500 per year. The Ottawa Mission also provides a comprehensive benefits plan, a Health Spending Account, and a Group Retirement Savings Plan along with many other perquisites.

If interested in applying, please forward your cover letter and resume, with "Planned Giving Officer" in the subject line, to: hr@ottawamission.com

We thank all applicants for their interest in The Ottawa Mission, however, due to the volume of resumes

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we receive, only those selected for an interview will be contacted.

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THE OTTAWA MISSION IS AN EQUAL OPPORTUNITY EMPLOYER