

# Bilingual Program Manager – Canadian Foundation for Financial Planning

Full Time Permanent Position

## POSITION OVERVIEW

Reporting to the Interim Executive Director, the Program Manager will oversee the day-to-day work of the Canadian Foundation for Financial Planning as we shift from the pilot project phase to regular, sustained programming. In this new role, you will have the opportunity to help shape the future of the Foundation's pro-bono financial planning work.

## Key Responsibilities

In this role, you will:

- Volunteers
  - Contribute to creation of volunteer policies and procedures
  - Organize and conduct volunteer acquisition and training
  - Connect volunteers with appropriate community partners
  - Facilitate reimbursement for volunteer expenses
- Community Partner Agencies
  - Research and recommend potential community partners
  - Create and maintain relationships with partners
  - Organize group presentations and one-on-one pro bono financial planning opportunities, survey participants
  - Maintain records of presentations and survey results
- Curriculum Development
  - Work with community partners, FP Canada staff, and volunteers to tailor/translate educational content for specific audiences
  - Facilitate the addition of educational content to the Foundation website
- Act as the first point of contact with external stakeholders
- Act as liaison between the Foundation and FP Canada and the Institute of Financial Planning staff
- Manage the program budget in consultation with FP Canada finance staff
- Contribute to the creation of reports to funders and other stakeholders
- Assist the Interim Executive Director and Board with fund development, communications, budgeting and other duties

## Required Qualifications

The ideal candidate will have the following:

- Minimum three years project/program management experience
- Experience working in a nonprofit setting, collaborating with volunteers, funders, and partners
- Experience liaising with external and internal stakeholders
- Bachelor's degree in a relevant field of study or equivalent experience
- Ability to monitor expenses, work within a budget and process expenses for payment
- French/English bilingualism is required

## Competencies

The ideal candidate will demonstrate the following competencies:

- Demonstrated ability to take initiative and work efficiently with minimal supervision
- Take a proactive and analytical approach to problem-solving, communication, and management
- Work collaboratively and consider the needs of multiple stakeholders
- Establish and maintain excellent working relationships with peers
- Have a business mindset that is process-centered and detail-oriented
- Experience with MS Office Suite, SharePoint, and Raiser's Edge is an asset

## ABOUT THE FOUNDATION

The Canadian Foundation for Financial Planning Foundation is an independent registered charity supported by Founding Members FP Canada and the Institute of Financial Planning, two of Canada's leading financial planning certification and education organizations. The Foundation will help ensure that those who need it most have free access to financial planning information, giving them the knowledge and confidence to be financially secure. Learn more at

[www.canadianfoundationforfinancialplanning.ca](http://www.canadianfoundationforfinancialplanning.ca).

## WORKING WITH THE CANADIAN FOUNDATION FOR FINANCIAL PLANNING

Our office is located in downtown Toronto. This is a full-time permanent position working 5 days per week, during core business hours with some flexibility required. We offer a hybrid-work model, requiring at a minimum, two days a week (40%) on average, of employees' time be spent in the office.

We are committed to wellness and a healthy work environment for our employees. You will earn a highly competitive annual salary, generous paid vacation and personal time, and you will enjoy our comprehensive employee benefits, flexible work arrangements, and regular social events.

We are service-oriented, principled, and driven to make a societal impact, and we strive for and demand excellence, integrity, and respect from each other as well as our external stakeholders. We value collaboration and flexibility, and together have created a collegial and positive work environment.

## Our Commitment to Inclusion and Diversity

The Foundation values inclusion and diversity, and different perspectives and experiences; and we are committed to working towards an inclusive and diverse organization, reflective of Canada's population. We encourage candidates who identify in traditionally underrepresented communities (women, racialized persons, Indigenous persons, LGBTQ2S+, and persons with disabilities) to apply.

## Our Commitment to Accessibility

The Foundation is committed to ensuring equal access and participation for people with disabilities in accordance with the *Ontario Human Rights Code (OHRC)* and the *Accessibility for Ontarians with Disabilities Act (AODA)*. We will provide accommodation on request throughout the recruitment, selection and/or assessment process for applicants with disabilities. If you require accommodation, please inform our Human Resources Department at [careers@fpcanada.ca](mailto:careers@fpcanada.ca).

## ABOUT FP CANADA

The Foundation is housed within FP Canada and works closely with its staff. Established in 1995, FP Canada is a national not-for-profit education, certification and professional oversight organization working in the public interest. FP Canada is dedicated to championing better financial wellness for all Canadians by leading the advancement of professional financial planning in Canada.

## SALARY

Salary based on experience, ranging from \$75,000 to \$80,000.

## HOW TO APPLY

To apply, please submit your application to [careers@fpcanada.ca](mailto:careers@fpcanada.ca) and note the position title in the subject line. Applications will be accepted until **January 16, 2025**.

We wish to thank all applicants for their interest and advise that only those selected for an interview will be contacted.