



Last Updated: November 2021

Job Title

Donor Engagement Officer, Planned Giving

Impact Statement

MSF Canada's Fundraising Department is responsible for raising private funding, predominantly from individuals, by integrated direct response campaigns, major gifts, and legacy and planned giving vehicles, to support our operations in the field and our activities in Canada. The department now generates over \$75 million annually and has an ambitious plan to grow as part of the 2020-2023 strategic plan. Fundraising team members are in Toronto and Montreal and work in collaboration with suppliers and vendors across Canada.

The Planned Giving Officer is a member of the Philanthropy Fundraising team. They develop and implement the planned giving communications and stewardship program, managing planned giving marketing initiatives and providing a holistic approach to integrate the planned giving outreach activities to grow year after year the planned giving portfolio and income. The Planned Giving Officer oversees relationship management of key internal and external stakeholders to ensure a steady flow of confirmed, prospective, and retained planned giving donors.

Key Responsibilities

- Build and nurture long lasting donor relationships
- Support and build Planned Giving events and awareness strategies
- Collaborate with other fundraising teams to identify warm leads
- Offer regular reports and data maintenance for Planned Giving and other MSF Fundraising teams collaborating with Planned Giving

Job-Specific Competencies

1. Planned Giving Relationship-Building and Stewardship

- Identify, cultivate, solicit, acknowledge, engage, and steward a portfolio of Planned Giving donors
- Lead the implementation of donor journeys, stewardship, and recognition plans
- Facilitate meetings between donors and MSF representatives (including the Executive Director, management team, board members, field workers, and members of the MSF Association)
- Liaise with the Prospect Researcher to prepare tailored briefing notes for top prospect meetings
- Develop stewardship plans for allied professionals including but not limited to financial advisors, wealth managers, brokers, and lawyers
- Demonstrate sound knowledge and understanding of tax giving vehicles, MSF field work, and international humanitarian aid.

2. **Planned Giving Events & Awareness Building**

- Design donor events and roundtable discussions to promote planned giving as a method of giving
- Promote planned giving products to different audiences to achieve yearly targets
- Generate promotional activities through donor surveys, telemarketing, and external advertisements
- Develop digital marketing strategy to increase visibility of all planned giving vehicles
- Design and distribute educational resources to donors and Donor Engagement Officers to increase knowledge of planned giving

3. **Planned Giving Reporting & Integration**

- Track and report on planned giving acquisition initiatives, including creation of follow-up plans for respondents
- Help to identify warm leads, track responses, and coordinate communication with DEO's for confirmed and prospective planned giving donors
- Collaborate with MSF Canada Fundraising team to create and implement strategies for cultivating, soliciting, and stewarding planned gifts
- Identify partnership opportunities to collaborate with the Direct Marketing team to include planned giving in promotional activities
- Coach Donor Engagement Officers (DEO's) to independently solicit planned gifts and confirm charitable bequests
- In close collaboration with the DEO's, develop follow up plans for planned giving leads generated through direct marketing campaigns, information requests, and face to face meetings
- Ensure good record keeping (hard and electronic files and donor database) of donor correspondence

4. **Other**

- Liaise with broader international movement including participation in the MSF Legacy working group
- Maintain an understanding of the Canadian planned giving landscape through participation and membership in the Canadian Association of Gift Planners (CAGP)
- Remain active and share information with the Regional Planned Giving Round Table
- Contribute to the Annual Planning process, including budgeting and reporting

Core Competencies

- **Networking and Building Relationships** – Level 2 – Develops and maintains regular communication with stakeholders and can put people at ease, awaken their interest and sustains the relationship.
- **Service Orientation** – Level 4 - Maintains a relationship with Planned Giving donors and encourages donors to approach them with their needs. Anticipates and plans communication with donors while following procedures and “thinking outside the box” for advising, designing, and innovating.
- **Planning and Organizing** – Level 2 – Can keep priorities identified and distinguished between important and urgent issues. Comes up with ideas to improve planning and organization. Anticipates potential incidents and deviations from the planning and prepares solutions.
- **Commitment to MSF's Principles** - Level 2 - Always transmits a positive image of MSF in front of both colleagues and donors. Expresses their interest by talking/asking/giving informed opinions about MSF's activities.
- **Results and Quality Orientation** – Level 3 - Strives to continually improve work methods. Suggests new ways of increasing efficiency while demonstrating a continuous learning attitude.

Knowledge and Experience

- Experience with managing a donor portfolio, including managing relationships with 3rd party vendors, and external relationships such as Financial Advisors

- Experienced in customer service and ability to prioritize client/customer/donor requests
- Strong database management skills and experience in fundraising software
- Demonstrated commitment to professional ethics and safeguarding client/customer/donor confidentiality at all times

Education, Certifications, and Languages

- Fluency in English is essential
- Proficiency in French is very desirable
- Education or training in fundraising, marketing, communications, or a related field

Working Conditions

- Work is generally carried out during the day, Monday to Friday (9:00 a.m. to 5:00 p.m.), some weekends and evenings may be required
- Flexible work hours and ‘work-from-anywhere’ options are available, upon approval from manager
- The office environment is open concept and workspace is shared with colleagues
- Workstations consist of sit/stand desks, anti-fatigue floor mat, swivel chair, laptop with dock and double monitor, task lamp and telephone
- Work requires long hours in front of a computer/laptop screen
- During COVID-19 restrictions, employees are required to have their own workspace, access to internet, and phone

Additional Information

MSF Canada is a people-focused humanitarian organization that is proud to offer a diverse, collaborative, and inclusive work environment. We strongly believe this approach enhances our work and we’re committed to equity in employment. The organization seeks to attract and engage the best professionals to join and maintain meaningful, productive and lasting work relationships. We embrace diverse motivations and backgrounds of people working together to exhibit their passion in action for the social mission of MSF.

Job Information

Position Level: Individual contributor

Department: Planned Giving, Philanthropy, Fundraising

Position Status: Permanent, full-time (37.5 hours/week)

Location: Toronto or Montreal

Salary Grade: Level C on the MSF Canada 2020 Salary Grid, starting at \$66,513 per year

Status: Must be legally entitled to work in Canada, or in the location where the work is being carried out

Benefits: Health Spending Account, Lifestyle Spending Account, group insurance (Life, Dependent Life, AD&D), Peace of Mind plan (i.e. prescription drugs, accidental dental, hospital care, etc.), 5% RRSP contributions (no matching required), starting 4 weeks’ Vacation/year, flexible work hours, annual professional development budget, Employee and Family Assistance Program (EFAP), free access to internal Psychosocial Care Unit Services and a positive and innovative office culture grounded in our core values of humanity, integrity and results.

Relocation: MSF Canada is not in the position to support a work permit process for any country outside of Canada