

Fund Development Officer, Planned Giving

Apply for This Job

Fund Development · Ottawa, Ontario

Are you a true people person with great communication skills and empathy? So you thrive on building relationships with donors, meeting key performance indicators, and coordinating the steps involved in processing of bequests and other planned gifts?

Internal/External Posting Notice

Title:	Fund Development Officer, Planned Giving
Department:	Fund Development
Status:	Full-time, unionized
Location:	Remote in Canada - Ottawa, Ontario preferred
Immediate Supervisor:	Manager, Annual Giving
Salary:	\$62,814 - \$82,659
Level:	Band 2
Application Deadline:	Until suitable candidate is found

Oxfam Canada is an affiliate of the international Oxfam Confederation networked in over 90 countries as part of a global movement for change. Our mission is to build lasting solutions to poverty and injustice with a focus on improving the lives and promoting the rights of women and girls. We work directly with communities, partners and women's rights organizations to challenge the systems that perpetuate inequality and keep people poor. Together we seek to influence those in power to ensure that women trapped in poverty have a say in the critical decisions that affect them, their families and entire communities. That's why we believe that ending global poverty begins with women's rights.

Oxfam Canada offers a generous compensation and benefits program. Our comprehensive employee benefits package includes robust health, dental and wellness benefits, flexible working conditions and generous vacation and other leave provisions. We also offer the opportunity to be a part of our global movement for change! If you are passionate about tackling poverty, inequality and injustice around the world, believe in advocating for women's rights and ending patriarchy, and share our values of Empowerment, Solidarity, Inclusiveness, Accountability, and Courage – we want you on our team!

SCOPE OF POSITION:

Under the direction of the Manager of Major Gifts and Planned Giving, the Fund Development Officer, Planned Giving (FDO, PG) will implement, a comprehensive national strategy for Oxfam Canada's planned/deferred giving program. The post plays an important role in contributing to the current and future financial viability of the organization by identifying, cultivating and soliciting prospective donors and building and sustaining relationships with current donors. The FDO, PG will significantly grow the number and size of bequests as well as other planned

gifts. In carrying out their duties within a fully integrated fund development program, the Fund Development Officer, Planned Giving will work collaboratively with both internal and external stakeholders across Canada.

The FDO, PG is a true people person with great communication skills and empathy. They thrive on building relationships with donors, meeting key performance indicators, and coordinating the steps involved in processing of bequests and other planned gifts.

MAJOR RESPONSIBILITIES:

Donor Relationship Management

- Under the direction of the Manager of MG/PG, cultivates donor relationships and stewardship activities for over 200 existing confirmed legacy donors through various communication channels (phone, email, mail, face to face)
- Completes personalized meaningful interactions with each donor by implementing well-organized engagement plans and bespoke touchpoints
- Organizes special events with current and prospective legacy donors, encouraging donor stewardship through the Global Visionaries gift club

Portfolio Growth

- Under the direction of the Manager of MG/PG, implements the planned giving strategy to promote growth of the portfolio and meet program goals and objectives
- Working closely with the Annual Giving team, coordinates and implements a comprehensive, integrated plan for marketing planned giving, including the design, production and content of all planned giving resources and materials
- Works with Direct Response Officer and direct mail vendors on coordination of mailed legacy products
- Works with the digital communications staff to ensure the web-site accurately reflects and promotes the planned giving program and that Will Power and e-giving is leveraged appropriately for planned giving
- Ensures planned giving messaging is woven into the fabric of Oxfam Canada's communications
- Identifies and pursues planned giving prospects through various marketing strategies
- Cultivates, and secures confirmation from legacy leads via, various communication methods (phone calls, letters, email, face-to-face and online meetings) in a timely manner
- Provides tax and estate planning information to prospective donors outlining the benefits of various planned/deferred giving options
- Organizes and helps conduct training and information sessions for prospective donors, professional financial and estate planners, staff and other related constituencies across Canada
- Maintains current knowledge about gift planning
- Keeps abreast of tax laws and other regulations related to charitable giving;

Estate Administration

- Coordinates the files for estates, gifts of securities, insurance and other planned/deferred gifts with appropriate specialist(s).
- Maintains estate files and correspondence during probate of wills, contacts all estate executors, liaises with legal counsel, and reports all legacy gifts income;
- Maintains accurate record keeping and reporting of existing and potential legacy gifts;
- Establishes and maintains positive relationships with estate advisors and allied professionals through events and one on one meetings
- Maintains database information and both hard and digital copy files related to planned giving donors and potential donors while ensuring the confidentiality of this information

Other

- Monitors and ensures accuracy of program results
- Prepares regular update reports of program results and performance to the Manager
- Files expenses and invoices in a timely manner
- Contribute to annual planning and reporting discussions for the Philanthropy Unit
- Acts as first point of contact with Broker for all stock gifts for all gift types
- Other duties as assigned

REQUIRED KNOWLEDGE, EXPERIENCE & COMPETENCIES:

- University degree or post-secondary diploma or equivalent combination of education and experience in estate or financial management
- Five (5) years fundraising experience, with a minimum of three (3) years proven experience in a planned giving role in a charitable or non-governmental organization
- CFRE and/or a background in the financial planning sector in an advisory capacity is an asset
- Knowledge, understanding and commitment to global justice, social change, women's rights and gender equality
- Comprehensive knowledge of planned giving vehicles and demonstrated experience negotiating and securing planned gifts
- Demonstrated experience conducting meetings with donors or clients, and working directly with staff within and across departments using various communication methods including face-to-face, telephone and electronic platforms such as Zoom
- Possess superior customer service and public relations skills
- Excellent written and spoken skills in English required; including the ability to effectively communicate complex issues in a concise and easily understood manner
- Demonstrated ability to organize and prioritize work and manage multiple projects with high efficiency and accuracy

- Proven capacity to work in a self-directed manner as well as demonstrated capacity to work collaboratively with staff and volunteers
- High proficiency using computer applications including Microsoft Word, Excel, PowerPoint, Box, Teams and an understanding of CRM's such as Sales Force or Raiser's Edge database
- Ability to travel both nationally and internationally, sometimes in difficult circumstances
- Willingness to sign and abide by the Oxfam Code of Conduct.

- As a national organization, this role may be required to work non-traditional hours to meet the needs of donors, volunteers and during times of a disaster response and/ or appeals and will include travel across the country for face-to-face meetings.

In addition to competitive pay, we offer:

- 35-hour workweek and the ability to work flexible hours
- A hybrid workplace where staff can work from home and the Ottawa office
- 4 weeks paid vacation per year, plus paid office closure between Christmas and New Year
- Extensive health, dental and wellness coverage for you and your dependents
- Paid sick days, and additional time off for personal and care responsibilities
- Pension plan contributions
- Caring, compassionate and supportive work environment that recognizes that work is one of the many responsibilities we have to prioritize in our lives
- Regular opportunities for all staff across Canada to meet – in person and virtually – to learn, connect and grow as a team!

**** MUST be eligible to work in Canada ****

If you don't see yourself reflected in every job requirement listed in the posting above, we still encourage you to apply.

Oxfam Canada is committed to diversity and equity around the globe and in our workplace. All our work is led by three core values: Empowerment, Accountability, Inclusiveness. We welcome applications from: women, Aboriginal persons, persons with disabilities, ethnic minorities, persons of minority sexual orientation or gender identity, visible minorities, and others who may contribute to diversification and share our values. If you are invited to continue the selection process, please notify us as soon as possible of any particular adaptive measures you might require. Applicants are encouraged to share accessibility needs in the application process, and every attempt will be made to accommodate them.

Important Note: All offers of employment are conditional upon signing our strict code of conduct, subject to satisfactory references and may be subject to appropriate screening checks. We place a high priority on ensuring that only those who share and demonstrate our values are recruited to work for Oxfam Canada.

*For additional career opportunities within Oxfam Canada, please visit **[oxfam.ca/employment-opportunities](https://oxfamcanada.bamboohr.com/careers/127)**. Please note that we are not able to offer internships or overseas volunteer*

placements.

We welcome you to join our movement – sign up for news and updates today.

We thank all those who apply, however, only those selected for an interview will be contacted.