Last Updated: April 2026

Planned Giving Manager

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 has an ambitious plan to grow as part of its strategic plan. Fundraising team members are in Toronto and Montreal and work in collaboration with suppliers and vendors across Canada.

The Planned Giving (PG) Manager at MSF Canada will oversee all aspects of the PG unit, including marketing, donor engagement, estate administration, and mass marketing integration. They will cultivate relationships with loyal supporters, aligning their philanthropic goals with MSF's mission of providing medical humanitarian aid worldwide.

In this leadership role, the Manager will develop and implement strategies for communications, stewardship, and donor acquisition to meet annual revenue targets. They will drive PG marketing initiatives, collaborate on complex estate gifts, and ensure seamless integration of planned giving outreach to expand the donor portfolio and increase revenue. Additionally, the Manager will build and maintain relationships with key internal and external stakeholders, ensuring a steady pipeline of confirmed, prospective, and retained Planned Giving donors.

Key Areas of Responsibility and Accountability

- **Management of team and projects** – oversee and lead the PG Officer, PG Estates Officer, and PG Coordinator;
- **Maximize growth opportunities** – provide strong people skills and industry knowledge; Lead stewardship, engagement and acquisition strategies for PG unit, developing and researching best practices to recruit and engage new and existing bequests; Increase the income from donors (major, corporate, and planned giving) to fulfill the objectives outlined in the Strategic Plan;
- **Lead MSF Canada Organizational Performance Management (OPM) cycle for PG Unit** – including budgeting, Annual Plan (AP), and quarterly reports for the PG unit; Ensure responsible use of resources, including accountability for budget, contracts, and suppliers, recommending new strategies, or drafting proposals in anticipation of future needs;
- **Risk mitigation** - work with lawyers to ensure cash-flow, mitigating delays with estate distributions and contested estates; understanding of estate law; expert ability to advise Estate Trustees and hold estate solicitors accountable.
- **Data analysis –** Collaborate with the Fundraising Systems Unit to improve the teams' capacity to build a data-driven FR strategy and program.

Job-Specific Competencies

1. **Planned Giving Program Management (60%)**

- Collaborate with the Senior Manager of Philanthropy to upgrade and implement a comprehensive legacy giving strategy for prospective donors, and a strategy for existing legacy donors, advisors, lawyers and trustees.
- Develop and implement strategies to cultivate, solicit and steward planned giving donors year-round, including bequests, life insurance, RRSPs and other planned giving vehicles.
- Oversee and support the Planned Giving Officer's portfolio of key individuals for legacy giving prospecting; soliciting an annual target developed in partnership with the Senior Manager of Philanthropy
- Manage on-going Legacy Giving marketing campaigns, both online and offline.
- Collaborates with the mass marketing and development team to produce marketing content, digital assets and other external promotion material for Legacy Giving.
- Oversee and support the Planned Giving Estates Officer with the administration open estates and ensure that appropriate follow up is made to secure the gift and/or appropriate stewardship activities are provided to trustees and/or the deceased's families.
- Deliver reports monthly to monitor the success of the Legacy Giving Program and existing KPI's.
- Strategically develop relationship and donor stewardship plans for allied professionals including financial advisors, wealth managers, brokers, lawyers, etc., and delivering an optimal engagement strategy has an impact on the portfolio in both the short and long term.
- Develop and deliver collaborative strategies, and coaching opportunities, to identify leads, track responses, and coordinate communication with Donor Engagement Officers to further their solicitation of charitable bequests; for cultivating, soliciting, and stewarding planned gifts. In an effort to promote blended giving and the culture of philanthropy.
- Manage partnership opportunities to collaborate with the Direct Marketing team to include planned giving in promotional activities
- Manage follow-up plans for PG leads generated through direct marketing campaigns, information requests, and face to face meetings

2. Leadership and People Management (30%)

- Lead in the hiring, development, and performance empowerment of team members with professional fundraising development experience in a timely manner; establishing trust, respect, recognition, and mutual accountability in a high performance, collaborative environment.
- Oversee the implementation of the annual plan and strategic plan, track revenue and expenses of the program and propose route correction when needed to achieve the goals
- Lead by example, inspire and motivate others, and foster a work environment founded on our core values of humanity, integrity and results
- Monitor and evaluate the success of planned giving initiatives by tracking key performance indicators (KPIs) and objectives and key results (OKRs).
- Provide regular updates to leadership, delivering clear and actionable reports on the progress towards annual and long-term goals for the program.
- Analyze data to identify trends, challenges, and opportunities for growth, making recommendations for adjustments to strategies as needed.
- Serve as a key member of the Fundraising Management Team, contributing to discussions on overall fundraising strategy and the implementation of organizational change.

3. Thought Leadership & Industry Trends (10%)

- Stay informed on emerging trends in legacy giving by engaging with industry associations and thought leaders.
- Represent the organization in the MSF Legacy Working Group, contributing insights and aligning strategies with the broader international movement.

- Develop expertise in the Canadian planned giving landscape through active participation in the Canadian Association of Gift Planners (CAGP).

MSF Transversal Core Competencies

- **Commitment to MSF's Principles**; *Proficiency Level 1:* Demonstrates Knowledge of and Accepts MSF's Principles
- **Cross-cultural awareness;** *Proficiency Level 3:* Demonstrates an Integrating Attitude.
- **Leadership;** *Proficiency Level 3:* Encourages, Engages and Motivates People .
- **People management and development;** *Proficiency Level 3:* Works on the Growth and Development of Team Members
- **Results and Quality Orientation;** *Proficiency Level 3:* Improves Performance and Sets Ambitious and Realistic Goals
- **Networking and Building Relationships;** *Proficiency Level 3:* Creates Network Opportunities

Knowledge and Experience:

- Demonstrated fundraising experience, with a strong focus on managing a Planned Giving portfolio in diverse settings such as charities, NGOs, or the financial sector.
- Proven ability to lead donor acquisition and marketing campaigns for legacy giving, including overseeing multi-channel strategies and audience segmentation.
- Experience managing relationships with 3rd party vendors and external legal counsel, ensuring compliance and effectiveness in planned giving operations.
- Proven track record of meeting clear performance metrics and fundraising goals in planned giving and legacy fundraising.
- Demonstrated success in leading and developing diverse teams, including direct reports, while fostering a positive work environment, providing constructive feedback, and implementing professional development initiatives.
- Skilled in strategic donor engagement, stewarding high-net-worth individuals and collaborating with financial advisors, wealth managers, and estate lawyers.
- Experience managing CRM systems and donor databases to track prospect engagement, performance, and reporting.
- Ability to navigate complex financial instruments and tax laws related to charitable giving while working with donors and legal professionals.

Education, Languages, and Certifications:
Education:

- Background in Nonprofit Management, Business Administration, Marketing, Communications, Finance, or Law
- A Certified Fund-Raising Executive (CFRE) designation or coursework in planned giving, estate law, tax law, or financial planning is an asset
- Fluency in English
- Proficiency in French is preferred

Working Conditions

- Work is generally carried out during the day, Monday to Friday (9:00 a.m. to 5:00 p.m. Eastern Time)
- Hybrid work model (40% in MSF Canada office per week)
- Office environment is open concept, and workspace is shared with colleagues

- Workstations consist of sit/stand desks, swivel chair, laptop with dock and double monitor
- Interaction with MSF donors, the public at large, senior representatives within MSF, and various internal and external stakeholders
- High levels of stress and/or pressure (particularly Q4 and Q1 of new year for year-end and reconciliation

Travel Requirements

- Percentage of time required to travel, domestic/international (10%) for donor meetings; off-site events; conferences; working group meetings, etc.
- Potential travel within Canada for exceptional estates (>5%)
- Potential international travel to other MSF Offices and countries hosting MSF projects (>5%)

Job Information

Position Level: People Leader
Department: Fundraising / Philanthropy
Position Status: Contract (12 months)
Activity Rate: 100% (37.5 hours per week)

Location: Toronto

Salary Grade: Level 16, Step 1, $87,850.00 per year on the MSF Canada Salary Grid (non negotiable)

Status: Candidates must be legally authorized to work in Canada; MSF Canada is not able to support or relocate candidates from outside Canada.

Benefits: Starting 4 weeks' vacation/year, flexible work hours, 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 employee contribution required), annual professional development budget, Employee and Family Assistance Program (EFAP), internal psycho-social resources, and a positive and innovative office culture grounded in our core values of humanity, integrity, and results.

APPLY HERE IN ENGLISH OR FRENCH