



## Planned Giving Specialist

Fund Development · Ottawa, Ontario

Apply for This Job

Department Fund Development

Employment Type Full-Time

Minimum Experience Experienced

### Internal/External Posting

<b>Title:</b>	Planned Giving Specialist
<b>Department:</b>	Fund Development
<b>Status:</b>	Full-time, Unionized
<b>Location:</b>	Ottawa, Ontario
<b>Immediate Supervisor:</b>	Manager, Major Gifts and Planned Giving
<b>Salary:</b>	\$66,485.00 - \$86,330.15
<b>Level:</b>	Band 3
<b>Deadline to apply:</b>	<b>January 28, 2022</b>

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 Specialist, Planned Giving will design, implement, manage and evaluate a significantly expand on a comprehensive national strategy for Oxfam Canada's planned/deferred giving program. The post plays a critical 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 Fund Development Specialist, Planned Giving 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 Specialist, Planned Giving will work collaboratively with both internal and external stakeholders across Canada.

### MAJOR RESPONSIBILITIES:

#### Portfolio Management

- Manages donor relationships and stewardship activities for over 200 existing confirmed legacy donors
- 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

- Leads on development of a comprehensive, integrated plan for marketing planned giving, including the design, production and content of all planned giving resources and materials
- Works with 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**

- Executes and manages the administrative duties of the position including files for estates, gifts of securities, insurance and other planned/deferred gifts.
- Maintains estate files and correspondence during probate of wills, contacts all estate executors, liaises with legal counsel, and reports all legacy gifts income;
- Responsible for 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
- Develops and maintains database information and both hard and digital copy files related to planned giving donors and potential donors while respecting the confidentiality of this information

#### **Other**

- Monitors and analyses program results
- Prepares regular update reports of program results and performance to the Manager
- Files expenses and invoices in a timely manner
- Supports Manager in related budget and cost centre management and compliance
- Responsible for all administration for the planned giving program
- Acts as first point of contact with Broker for all stock gifts for all gift types
- Provides coverage for the Major Gift Officer during absences

#### **REQUIRED KNOWLEDGE, EXPERIENCE & COMPETENCIES:**

- Five years fundraising experience, with a minimum of three years proven experience in a planned giving role in a charitable or non-governmental organization
- University degree or post-secondary diploma or equivalent combination of education and experience in estate or financial management
- 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
- As a national organization, this role will 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.
- 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.

#### **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 \*\***

*Oxfam Canada is committed to diversity and equity around the globe and in our workplace. All our work is led by these core values: Empowerment, Solidarity, Inclusiveness, Accountability, and Courage. We welcome applications from: women and individuals who are non-binary or hold other expressions of gender diversity, Indigenous peoples, racialized people, people with disabilities, and members of the 2SLGBTQIA+community. If you are invited to continue the selection process, please notify us as soon as possible of any particular adaptive measures you might require.*

**Important Note:** *All offers of employment are conditional upon signing our 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.*

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

*For additional career opportunities within Oxfam Canada, please visit [oxfam.ca/employment-opportunities](https://oxfam.ca/employment-opportunities). 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.*

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