

Job Title

Planned Giving Coordinator (interim)

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 the strategic plan. Fundraising team members are in Toronto and Montreal and work in collaboration with suppliers and vendors across Canada.

The Interim Planned Giving Coordinator is responsible for supporting the administration and stewardship of legacy and planned gifts. This role ensures the accurate recording, processing, and management of estate gifts, annuities, insurance, and other planned giving vehicles. The administrator will work closely with donors, financial advisors, legal representatives, and internal teams to ensure compliance, donor recognition, and efficient execution of planned giving strategies. The Interim Planned Giving Coordinator oversees record keeping of physical and electronic files and is responsible for the effective management of confidential and sensitive estate records through their lifetime at MSF Canada.

Key Responsibilities

- Provide administrative and operational support to the Planned Giving team
- Ensure timely acknowledgment and stewardship of legacy donors, supporting engagement strategies to strengthen donor relationships.
- Support marketing and communication efforts for planned giving, including newsletters, brochures, and donor recognition materials.
- Records keeping and database management, ensuring procedures are followed and information is recorded correctly
- Relationship management and coordination, work to build and maintain relationships with internal and external stakeholders.

Job-Specific Competencies

Planned Giving Administration (70%)

- Oversee the efficient processing and administration of estate gifts.
- Process and deposit incoming planned giving contributions, ensuring accurate reconciliation of funds.
- Coordinate with stakeholders to manage cheque, wire transfer, and other financial transactions related to planned gifts.
- Manage and receipt planned gifts, including life insurance policies and annuities.
- Maintain organized records by archiving files according to MSF protocols.

- Generate and analyze reports to track planned giving contributions and donor engagement.
- Develop and maintain filing systems, both physical and electronic, for planned giving records.
- Ensure compliance with PIPEDA principles for data protection and storage.
- Train staff on proper record-keeping and access protocols for planned giving data.
- Collaborate with the Data team to ensure data accuracy and maintain high standards of data hygiene.

Stewardship Support (20%)

- Respond promptly to donor inquiries, providing high-quality support and engagement.
- Assist in developing and executing quarterly stewardship plans.
- Ensure all planned giving donors receive timely and personalized acknowledgments.
- Call donors for gift acknowledgement within 24-28hrs, send condolence cards, and thank you letters.

Relationship Management (10%)

- Manage the administration of specific bequests and ensure proper distribution.
- Work closely with executors, family members, and friends of donors to acknowledge and process gifts with sensitivity and professionalism.
- Coordinate with internal teams, including finance and fundraising, to facilitate the realization of donors' gifts.
- Act as a liaison between MSF and external service providers to support the digitization of files.
- Handle inquiries from internal and external stakeholders regarding planned giving.

Core Competencies

- **Commitment to MSF's Principles;** Proficiency Level 2: Demonstrates loyalty, awareness and respect for MSF's values
- **Cross-cultural Awareness;** Proficiency Level 3: Demonstrates an integrating attitude
- **Results and Quality Orientation;** Proficiency Level 3: Improves performance and sets ambitious and realistic goals
- **Planning and Organising;** Proficiency Level 3: Follows up, plans activities and sets priorities
- **Teamwork and Cooperation;** Proficiency Level 2: Shares information and coordinates with team and/or others

Knowledge and Experience

- Demonstrated professional experience in the fields of records management, legal assistance, and or administration
- Minimum of 2 years of experience in fundraising, planned giving, estate administration, or a related field.
- Strong understanding of estate planning, wills, bequests, charitable gift annuities, and life insurance.
- Experience using donor management or CRM software such as Raisers Edge.
- Excellent attention to detail, organizational skills, and ability to manage multiple priorities.
- Strong interpersonal and communication skills to work effectively with donors, legal professionals, and internal teams.
- Knowledge of tax and legal regulations related to charitable giving is an asset.

Education, Certifications and Languages

- Courses in fund development, record management, ad project management or equivalent professional experience
- English proficiency
- French is an asset

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 and up to 60% work from home)
- 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
- Domestic travel required (include 10 %)
- Interaction with clients/donors and the public at large
- High levels of stress and/or pressure

Job Information

Position Level: Individual contributor

Department: Fundraising / Philanthropy / Planned Giving

Position Status: Contract (12 months)

Activity Rate: 100 %, 37.5 hours per week

Location: Toronto

Salary Grade: Level 13 on the MSF Canada Salary Grid, \$64,251.00 per year

Status: Must be legally authorized to work in Canada; MSF Canada is not in the position to support a work permit process for any applicant outside of Canada.

Benefits: Starting 4 weeks' vacation/year, flexible work hours, Health Spending Account, group insurance (Life, Dependent Life, AD&D), 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.

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.

MSF Canada acknowledges the existence of systemic racism and oppression and is committed to sustaining and strengthening its anti-racism and anti-oppression (AOAR) efforts. As MSF Canada continues to grow and strive to remove barriers in its offices in Canada and in MSF work environments abroad, we welcome applications from individuals with unique experiences of intersectional oppression on the basis of their social markers such as their ethno-racial identity, age, gender identity, education, socio-economic status or place of origin. We encourage Black, Indigenous, People of Colour, LGBTQIA2S+ people, individuals living with disabilities and any individual deserving equity to apply.

In line with MSF's December 2021 pledge to reduce our carbon emissions by 50% by 2030, compared to our 2019 baseline, we encourage everyone to embrace and embed sustainable and climate-friendly practices. Applying a climate and planetary health lens will help us improve our operational impact. Facing climate change and environmental degradation through our operational activities by focusing on mitigation and adaptation will decrease our dependency on fossil fuels, reduce our ecological footprint and help protect human health. Everyone, at all levels, with all skill sets is needed to address the global threat of climate change.