

## **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 \$97 million annually and has an ambitious plan to grow as part of the 2025-2028 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**

- Be the first point of contact for Planned Giving inquiries at MSF
- 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 Responsibilities**

### **Planned Giving Relationship-Building and Stewardship**

- Identify, cultivate, solicit, acknowledge, engage, and steward a portfolio of Planned Giving donors and prospects.
- Lead the implementation of existing donor journeys, stewardship, and recognition plans in collaboration with the Donor Journey Integration Officer
- Respond promptly to planned giving inquiries and information requests and prepare follow-up calls on a regular basis
- Drives and implements moves management for their own portfolio, documenting all contacts and next steps in CRM. Build appropriate strategies and create the tools needed to initiate and cultivate these relationships, including crafting opportunities for blended giving strategy in collaboration with the Major Giving Team
- Facilitate meetings between donors and MSF representatives (including the Executive Director, management team, board members, field workers, and members of the MSF Association)
- Demonstrate sound knowledge and understanding of tax giving vehicles, MSF field work, and international humanitarian aid.

### **Planned Giving Events & Awareness Building**

- Design online and in-person donor events to promote planned giving as a method of giving

- Collaborate with the Major Giving and Corporations/Foundations units to promote planned giving products to different audiences during events and meetings to achieve yearly targets
- Execute annual plan to reach an external audience and promote gift in a will to people outside our donor database
- Implement digital marketing strategy to increase visibility of all planned giving vehicles and review strategy to ensure ROI.
- Distribute educational resources to donors and Donor Engagement Officers to increase knowledge of planned giving

#### **Planned Giving Reporting & Integration**

- Track and report on planned giving acquisition initiatives, implementation 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

#### **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)
- Contribute to the Annual Planning process, including budgeting and reporting
- Assist with estate administration tasks as required.

#### **Core Competencies**

- **Commitment to MSF's Principles** - Level 1 - Demonstrates Knowledge of and Accepts MSF's Principles
- **Networking and Building Relationships** – Level 2 – Develops and Diversifies Networks
- **Service Orientation** – Level 4 - Seeks Long-Term Benefits for Clients
- **Planning and Organizing** – Level 2 – Is Proactive Regarding Planning and Organising His/Her Job Area
- **Results and Quality Orientation** – Level 3 - Improves Performance and Sets Ambitious and Realistic Goals

#### **Knowledge and Experience**

- Experience with managing a donor portfolio, including managing relationships with 3rd party vendors, and external relationships such as Financial Advisors
- Experience 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
- Demonstrated experience in fundraising, marketing, communications, or a related field

#### **Education, Certifications, and Languages**

- Fluency in English

- Professional proficiency in French is highly 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, anti-fatigue floor mat, swivel chair, laptop with dock and double monitor
- Domestic travel required (30 %)
- Interaction with clients/donors and the public at large

### Job Information

**Position Level:** Individual Contributor

**Department:** Fundraising / Planned Giving

**Position Status:** Permanent

**Activity Rate:** 100 % , (37.5 hours per week)

**Location:** Toronto

**Salary Grade:** Level 14 on the MSF Canada Salary Grid, \$70,676.00 per year

**Status:** Must be legally authorized to work in 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.

### 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