



*Last Updated: September 2024*

## 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

- 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

### 1. Planned Giving Relationship-Building and Stewardship

- Identify, cultivate, solicit, acknowledge, engage, and steward a portfolio of Planned Giving donors
- Lead the implementation of existing donor journeys, stewardship, and recognition plans
- Facilitate meetings between donors and MSF representatives (including the Executive Director, management team, board members, field workers, and members of the MSF Association)
- Liaise with the Prospect Researcher to prepare tailored briefing notes for top prospect meetings
- Demonstrate sound knowledge and understanding of tax giving vehicles, MSF field work, and international humanitarian aid.

### 2. Planned Giving Events & Awareness Building

- Design donor events and roundtable discussions 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

### 3. **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

### 4. **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

## **Core Competencies**

- **Networking and Building Relationships** – Level 2 – Develops and maintains regular communication with stakeholders and can put people at ease, awaken their interest and sustains the relationship.
- **Service Orientation** – Level 4 - Maintains a relationship with Planned Giving donors and encourages donors to approach them with their needs. Anticipates and plans communication with donors while following procedures and “thinking outside the box” for advising, designing, and innovating.
- **Planning and Organizing** – Level 2 – Can keep priorities identified and distinguished between important and urgent issues. Comes up with ideas to improve planning and organization. Anticipates potential incidents and deviations from the planning and prepares solutions.
- **Commitment to MSF's Principles** - Level 1 - Always transmits a positive image of MSF in front of both colleagues and donors. Expresses their interest by talking/asking/giving informed opinions about MSF's activities.
- **Results and Quality Orientation** – Level 3 - Strives to continually improve work methods. Suggests new ways of increasing efficiency while demonstrating a continuous learning attitude.

## **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

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

- Fluency in English
- Education or training in fundraising, marketing, communications, or a related field

### **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 and international travel required (30 %)
- Interaction with clients/donors and the public at large

### **Job Information**

**Position Level:** Individual Contributor

**Department:** Fundraising / Philanthropy / Planned Giving

**Position Status:** Temporary – 12 months, Maternity Leave coverage

**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; 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.