



## Program Coordinator- Planned Giving

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Please apply here : [Position Description](#)

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- **Title:** Program Coordinator-Planned Giving
- **Employee Working Location:** Partially Virtual / Hybrid (Ottawa)
- **Employment Status:** Permanent Full-time

The Canadian Red Cross (Red Cross) – an inspirational not for profit organization, helps people and communities in Canada and around the world in times of need and supports them in strengthening their resilience. As a **Canada's Best Employers 2024**, we are committed to having an accessible, diverse, inclusive, and barrier-free work environment.

The Program Services Coordinator, Planned Giving works in collaboration with members of CRC's Planned Giving, Legal and Finance teams and with external stakeholders, supporting estate administration and planned giving program activities. Using administrative and relationship management skills, the PG Coordinator is responsible for managing, distributing and filing legal documentation, processing direct mail leads, handling gifts of shares and insurance policies, and providing administrative support to other members of the Planned Giving team as needed.

### In this role, you will :

- **Estate and other types of Planned Gifts Administration Support (60%)**
- In collaboration with CRC's Legal Department and Planned Giving staff, and within the context of the Bequest Administration Policy, coordinate correspondence between estate executors and CRC.
- Receive notification of estates and respond with appropriate acknowledgement.
- Facilitate communication and collaboration with internal teams and external partners, including lawyers, notaries and executors, for all Planned Giving inquiries.
- Alert the Bequest Analyst and the Senior Management, Planned Giving of any contentious estate relationship issues.
- Engage with executors, lawyers and other charitable beneficiaries to build relationships, obtain status update for estate administration and confirm distributions schedules with the objective to reduce administration time and increase program efficiency.

- Forward charitable tax receipts for estate distributions along with an acknowledgment letter to estate executors.
- Assist in preparing reports and analyses to ensure an efficient and proper management of planned gifts.
- Request annual premium payment statements for policies owned by CRC from the insurer and ensure the receipts are issued to donors.
- Ensure the support for the gift of shares processing.
- Assist in developing and maintaining documentation to ensure consistency across Planned Giving program.
- Ensure all correspondence is completed in a timely manner.
- Ensure all legacy gift information is captured accurately in database in timely manner.
- Maintain and update reports and database, including tracking budgets and reporting requirements.
- Report on key Planned giving donations to support decision-making.
- Ensure all documentation received is filed and forward all original documents to the Bequest Analyst.
- Keep accurate files to ensure coordination of the stewardship materials to support relationship-building efforts.

### **Program Support (30%)**

- Manage data entry of responses from all Planned Giving Lead Generation activities.
- Accurately capture donors' legacy interest and intentions in donor database following the procedures in place.
- Support Planned Giving advisors with planned giving leads requiring follow-up.
- Forward any donations received to National Payment Centre for processing
- Notify and support Planned Giving Advisor when potential donors for planned gifts are identified through planned giving administration.
- Draft correspondence and follow up on donor and family recognition activities as required.
- Assist in recognition and stewardship of donors who have expressed an interest in planned gifts.
- Respond to or redirect donor inquiries, including inquiries forwarded from the CRC website and call centre
- Assist with the planning, coordination, and execution of donor events, cultivation meetings, and recognition activities, ensuring a high-quality experience for donors and partners.
- Conduct estate research on donors, prospects, to inform fundraising strategies and identify new opportunities for engagement and solicitation.

### **Other (10%)**

- Use Standard Operating Procedures and Working Instruction Documents (WIDs)
- Organize and facilitate Planned Giving and Philanthropy meetings, key activities - virtually and in person as needed, ensuring proper documentation and follow-up
- Integrate volunteer resources within the scope of responsibilities where appropriate

- Participate in disaster response as needed

**What we are looking for :**

- 3-5 years experience as administration assistant/coordinator. Legal or para-legal training is an asset. Experience working on a planned or legacy giving team is preferred.
- Proficient with Microsoft Office 365 applications and SharePoint is required.
- Experience with Blackbaud CRM or other relational databases an asset.
- Strong communication skills - verbal and written - in EN & FR are preferred.
- Displays tact, diplomacy, attention to detail and trustworthiness.
- Ability to manage program schedules and timelines; prioritize tasks, track progress, and meet deadlines.
- Strong attention to detail and follow through with tasks over the course of time
- Ability to adapt to changes in the business environment or client requirements.

**Working Conditions :**

- As we work with and support people (managers, colleagues, beneficiaries/customers, volunteers, donors and external partners) and communities in Canada and around the world, applicants whose first language is not English may be required to perform the responsibilities of the role in English.
- Eligibility to work in Canada: At this time, we welcome applications from candidates eligible to work in Canada. If you are not a citizen or permanent resident of Canada, we encourage you to carefully review your visa to find out whether you are eligible to work in the job you are considering applying for. Refer to our FAQ for more information.
- If you are selected for this role, you will be required to complete a successful pre-employment screening process which includes a satisfactory Enhanced Police Information Check (E-PIC).