



GIFTS & ESTATES ADMINISTRATOR

Employment Type: Full time - Permanent (37.5 hours per week)

Location: Calgary, Alberta (applicant must reside in Calgary)

Starting Salary Range: \$60,000-\$70,000 per year. The final compensation for this position will be determined based on individual factors, including education, qualifications, experience, and internal equity.

WHO WE ARE:

Since 1955, Calgary Foundation ("Foundation") has been nurturing a healthy, vibrant, giving and caring community. This community foundation of 50 staff members and 80+ committee volunteers facilitates collaborative philanthropy by making powerful connections between donors and community organizations for the long-term benefit of Calgary and area.

The Foundation has committed to active Reconciliation in accordance with the Truth and Reconciliation Commission (TRC) 94 calls to action and United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) as an important and integrated part of our culture. In addition, Calgary Foundation is undertaking a journey of establishing a Racial Equity Culture as one that is focused on proactive counteraction of race inequities inside and outside an organization. Our Reconciliation and Racial Equity journey is intentional with meaningful participation from all team members both collaboratively and as individuals.

GENERAL PURPOSE OF THE POSITION:

You will advance the vision and mission of Calgary Foundation by contributing to the effectiveness of the organization in supporting donors and their families, and professional advisors, seeking information and guidance in the creation of legacy funds.

SCOPE OF RESPONSIBILITIES:

- Estate & Bequest Administration (20%)
- Donation and Tax Receipting Reconciliation (20%)
- Drafting of Fund Agreements and Other Documentation (20%)
- Responding to internal and external requests for information from other departments, Donors, Donor Prospects, and Professional Advisors (15%)
- Life Insurance Portfolio Management (10%)
- Fund File Management (10%)
- Donor Relations Team Administrative Support (5%)

WHAT YOU WILL BE DOING:

As a key member of the Donor Relations (DR) Team, and working closely with all other teams within the Foundation, The Gifts and Estates Administrator contributes to the following organizational outcomes:

Desired Outcomes:

- Donors are aware of and satisfied with the services and interaction they receive, acknowledging that this includes a range of expectations

- The Foundation is a respected and reliable resource on the topic of philanthropy
- The Foundation continues to build its knowledge and capacity for complex gifts including bequests
- Professional Advisors are a growing source of donor referrals

Primary Outputs:

As a key member of the Donor Relations Team, principal tasks include:

- Responsibility of bequests portfolio, including estates in progress, future funds and life insurance.
- Preparation of supporting documents for the application of a Grant of Probate when a charitable bequest notice is received by the Foundation.
- Reviewing estate financial statements and executor progress reports and assimilating updates in Foundation Information Management System ("FIMS") database and bequest spreadsheets.
- Maintaining annual record-keeping requirements for life insurance policies gifted to and owned by the Foundation.
- Works with all departments to ensure seamless internal processes for establishing new funds and receiving gifts
- Drafting of new agreements, amendments, and change fund forms for all fund types.
- Reconciling all donations between DR and Finance teams, including documenting in a timely manner gift of securities donations received
- Daily review of activity via the Foundation custodial accounts.
- Reviewing and regularly mailing out official charitable tax receipts & other pertinent correspondence.
- Responding to fund creation inquiries from donors, donor prospects and professional advisors and distributing information packages.
- Preparing quarterly Future Gifts report, new Fund spreadsheet, as well as annual Term Fund spreadsheet.
- Review Annual Report section for new funds, named funds in the community fund, future gifts and estates in progress.
- Coordinating information required to regularly update and maintain materials for information toolkits and website.
- Maintaining accurate and complete fund files including filing, retiring and custody of all electronic and paper documents.
- Developing and maintaining working knowledge of internal operating procedures.
- Advising fund contacts for in memory gifts made.
- Coordinating gifts to, and making grant requests from the Calgary Foundation Fund at California Community Foundation.
- Administrative support for Advisor Engagement Committee meetings
- Monitoring and responding to emails received at Donations@calgaryfoundation.org

Measures of Performance Success:

- Accurate, effective, and efficient responsiveness to requests from the VP Donor Engagement, Donors, and Professional Advisors
- Quality of feedback from external and internal contacts, including other team members, Calgary Foundation staff and volunteers
- Provides recommendations for ongoing improvements to operational processes
- Represents Calgary Foundation at various public events to engage and inform community
- Seeks growth opportunities through participation in donor meetings, seminars and conferences

WHY WORK AT CALGARY FOUNDATION:

You have a passion to build a healthy and vibrant community where everyone belongs. You thrive with challenging work and value a culture of collaboration, professionalism, and mutual respect. You are committed to upholding and promoting the values of the Calgary Foundation.

Calgary Foundation is an equitable employer, and we encourage applications from members of groups who face historical and/or current barriers to equity. We value the contributions that each person brings and are committed to ensuring full and equal participation for all in our community.

OUR VALUES ARE:

Accountability – We are answerable to the community and our stakeholders for our practices and results.

Compassion – We care about people and consider individual and community wellbeing.

Excellence – We aspire to exceptional performance and are committed to best practices.

Inclusiveness – We embrace diverse knowledge, backgrounds and perspectives and encourage collaborative communities.

Integrity – We are trustworthy, honest, reliable, and ethical.

WHAT WE'RE LOOKING FOR IN YOU:

- Post-secondary degree or diploma
- Proven successful work experience in the areas of Wills, Trust & Estate Administration
- Proficient in MS Office essential, and experience with non-profit CRM software such as MicroEdge, FIMS or Blackbaud Raiser's Edge an asset
- Possess knowledge of legal agreements, including but not limited to gift and fund agreements
- Familiarity with gifts of securities
- Excellent organizational skills - ability to manage multiple timelines, tasks, and projects of varying complexity and approaching deadlines concurrently
- Experience working in a high-performing environment
- Strong written and oral communication skills, as well as interpersonal and collaborative skills
- Exemplary attention to detail and accuracy

HOW TO APPLY:

Interested candidates are encouraged to submit, via email, a [resume and cover letter in PDF format](#), by Aug 7, 2024, to Tracy Maracle, Vice President, Governance & Human Resources to email: careers@calgaryfoundation.org

In addition to salary, a comprehensive benefits package, participation in a matching RRSP program, and a hybrid work environment are also offered.

We thank all applicants for their interest, but only those selected for an interview will be contacted. For information regarding the Calgary Foundation please visit calgaryfoundation.org.

ADDITIONAL INFORMATION:

- All applicants must be legally entitled to work in Canada at the time of the application.
- If you need accommodation during any stage of the recruitment process, please email tmaracle@calgaryfoundation.org. Information relating to the need for accommodation and accommodation measures will be addressed confidentially.