



Posting Date: January 3, 2022

Job Title: Disability Planning Helpline Advisor

Organization: [Plan Institute](#)

Position Type: Contractual, part-time, remote working

Hours: 20-30 hrs/month (split roughly evenly each week), with the flexibility to increase hours according to demand for service and your availability/interest

Anticipated Start Date: February 14, 2022

Compensation: \$30/hour

About Plan Institute

Plan Institute is a nationally registered charity that works to improve the lives of people with disabilities through innovation, education, and leadership:

- **Innovation** – We engage in social innovation through community-based projects and partnerships that help to improve the lives of those living with disabilities.
- **Education** – We offer educational initiatives designed for individuals, families, and organizations. This includes workshops, courses, retreats, publications, and resources.
- **Leadership** – We provide collaborative leadership by convening a diverse group of stakeholders to encourage public policy reform and system transformation.

Plan Institute builds on the 30 years of Planned Lifetime Advocacy Network's (PLAN's) experience working with families to build a good life for people with disabilities. We currently have 7 affiliate organizations throughout Canada and the United States.

Visit our website to find out more: www.planinstitute.ca

What does the position entail?



This position will provide direct support to individuals with disabilities, families, and professionals requesting assistance on the Registered Disability Savings Plan (RDSP) and Disability Tax Credit (DTC) through our Disability Planning Helpline. You will join a team of like-minded Helpline Advisors who support individuals across Canada with questions about these topics as well as wills, trusts, estate planning, advocacy approaches, provincial/territorial disability assistance programs, social network building, and more. Our Helpline Advisors bring a wealth of professional experience and lived experience, often having lived with, or supported family members who have, a disability.

We are seeking an additional advisor who will support individuals with queries on the RDSP, DTC, and related services, primarily via the phone or via email. People can connect with the Helpline by calling or emailing in at any time and a Plan Institute team member will send to the appropriate advisor. Depending on your interest and experience, you may be asked to support on other projects as requested by Plan Institute.

As a Helpline Advisor, you must be able to work both independently and collaboratively and have excellent verbal and written communication skills. You will be expected to manage your own time and meet Plan Institute's expected response times.

Plan Institute is committed to providing ongoing paid training opportunities based on the interest and needs of the team, outside of your regular training. This position also offers the opportunity to work with a fantastic team of caring, compassionate, and talented people while making a positive impact in the community and on the lives of people with disabilities and their families.

Tasks and Responsibilities:

- Provide one to one support to individuals requesting assistance via phone or email communication, including follow-up where necessary.
- Complete associated reporting information following each consultation.
- Work with our partner organizations to help support and refer individuals requiring assistance as appropriate.
- Attend monthly virtual team meetings and mandatory training.
- Invoice for services provided monthly (invoice must be received within 30 days of completion of work) – template will be provided

Job Requirements:



To be considered for this position, your application must clearly demonstrate how you meet the skills and experience as outlined below:

- Detailed knowledge of the RDSP and DTC
- Strong English communication and interpersonal skills.
- Ability to communicate with a diverse group of people.
- Excellent active listening skills and able to communicate with empathy while supporting people who may be experiencing multiple challenges.
- Strong time management skills.
- Initiative-taker with the ability to work with minimal supervision.
- Quick learner who is comfortable asking for help and clarification as needed.
- Exceptionally organized and detail-oriented, while maintaining flexibility and adaptability.
- Ability to work collaboratively within a team setting and independently.
- Computer/laptop and reliable internet connection. Plan Institute will provide you with an email address and internet-based phone line to use but will not cover equipment or internet fees unless otherwise discussed.

Other skills/knowledge preferred but not required:

- Applicants who have personal, lived experience of disability through themselves, a close relative or friend, or organizational work.
- Understanding of and experience in the family-led disability movement and other marginalized populations.
- Understanding of asset-based community development, which relates to the belief that everyone in the community has something to offer and contribute.
- Experience providing one-on-one support on the phone and email.
- Knowledge of and familiarity with other disability benefits and disability planning topics, such as Wills, Trusts, Estate Planning, Housing, or Advocacy.
- Ability to communicate in multiple languages.
- Experience with giving presentations, as well as blog or article writing. This is not required for this position but depending on your interest and availability there may be opportunities available to participate in our presentations and resource development.

How to Apply:

- **Please submit your application through our survey at the following link here:**
<https://www.surveymonkey.com/r/DQY9XD9>
 - Applications will only be accepted through our application form unless you have accessibility requirements. If you do have accessibility requirements, please



email us at info@planinstitute.ca and alternative application submission options can be provided.

- Job posting closes on Sunday, January 23, 2022, at 11:59PM.
- We thank all applicants for their consideration of this position. Shortlisted applicants will be contacted by Friday, January 28, 2022.

If you have any questions about the position, please contact info@planinstitute.ca.

Plan Institute is committed to a safe, inclusive, and collaborative environment in which all individuals are treated with respect and dignity. As such, individuals from diverse backgrounds, including race, national or ethnic origin, sexual orientation, gender identity, disability, and mental illness are welcomed and encouraged to apply.

We welcome and encourage applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process. Accessible formats and communication supports are available for applicants by request; please contact info@planinstitute.ca.

- *Closing date: Sunday, January 23, 2022, at 11:59PM (PDT)*