

# Bequests/Gifts in Wills Relationship Officer

## Position Description

<b>Directorate:</b>	Commercial Enterprise, Fundraising and Communications
<b>Reports to:</b>	Manager, Gifts in Wills and Estates
<b>Direct reports:</b>	NIL
<b>Location:</b>	Charles O'Neill State Support Office, Lewisham NSW
<b>Primary position objective:</b>	Support the growth of the Gift in Wills portfolio by building a sustainable bequest development program by effectively prospecting, cultivating and soliciting Gifts in Wills prospects.

*The St Vincent de Paul Society is an Equal Employment Opportunity Employer*

### Directorate overview

This position is in the Commercial Enterprise, Fundraising and Communications Directorate. The teams within the directorate and their functions are:

**Fundraising:** this team is responsible for state-wide corporate partnerships, community fundraising and events; major gifts and philanthropy; gifts in wills and estates; direct marketing and appeals; and fundraising development.

**Communications and Marketing:** this team is responsible for state-wide brand and creative services; external communications; issue management; marketing; digital communications and digital fundraising.

**Retail and Logistics:** this team is responsible for state-wide retail service delivery; logistics and supply chain network; and retail projects.

**Commercial Enterprises:** this team is responsible for state-wide recycling and sustainability initiatives; Container Deposit Scheme (CDS); and new commercial enterprises.

### Accountabilities and responsibilities

The Gifts in Wills Officer will:

- Contribute to the successful implementation of the Strategic Plan within their team.
- Identify, cultivate and manage a pipeline of confirmed bequestors and potential benefactors through a strategic stewardship and conversion program to achieve the Society's fundraising objectives.
- Coordinate a formal Gifts in Wills mailing and nurturing programs to all prospects, potential and confirmed Bequestors, Honorary Solicitors and Persons of Interest.
- Maintain timely and accurate records in the Society's database.
- Initiate and maintain contact with prospects and bequestors through a stewardship program (personal visits, letters, phone calls, cards and special events).
- Coordinate volunteer programs and volunteers to assist the Gifts in Wills team.
- Develop a series of bequest tools and collateral including: brochures, booklets, In Memorium envelopes, cards and pamphlets.
- Work with the Gifts in Wills Team, Gifts in Wills & Estates Manager, Events and Marketing team and Services to run a series of targeted events at service sites.

- Work with the Gifts in Wills & Estates Manager to participate at an annual Benefactors (Forever Friends) Commemorative Service.
- Work closely with the events team to ensure bequestors and prospects are invited and engaged in the Society's annual Mass.
- Organise 'Thank you' functions where appropriate.
- Plan and organise Gifts in Wills speaking engagements that encourage new bequests to the Society.
- Ensure a safe working environment for members, staff and volunteers by implementing the Society's workplace health and safety practices.
- Ensure that staff and volunteers complete relevant pre-engagement checks (National Criminal History check, and where required Working With Children Check); act in accordance with the organisation's Code of Conduct and Member and Volunteer Charter; and comply with the organisation's Workplace Health and Safety program.
- Ensure that effective risk management protocols and procedures are in place to ensure compliance with legal, employment and governance requirements.

## Critical Key Performance Indicators (KPIs)

- Increase potential benefactors for Gifts in Wills.
- Increase retention rate of confirmed benefactors.
- Contribute to the achievement each year of 8-12% of our income from donations and philanthropy.
- Stewardship program shows marked increase in contact with prospects and bequestors.

## Key working relationships

In addition to the Manager, Gifts in Wills and Estates and their direct reports, the Gift in Wills Officer will foster close working relationships with:

- Director Fundraising (Commercial Enterprise, Fundraising and Communications);
- Manager, Finance, Commercial Enterprise and Fundraising (Commercial Enterprise, Fundraising and Communications);
- Director, Communications and Marketing (Commercial Enterprise, Fundraising and Communications);
- Director, Legal, Safeguarding and Complaints (Strategy and Governance);

## Essential criteria

### Critical capabilities

There are nine capabilities expected of all leaders across the Society:

- **'People we serve' centric:** (Level 1) Deliver, or support the delivery of, high-quality services that provide a hand up for the people we serve.
- **Values based leadership:** (Level 1) Develop an understanding and respect for and be aligned to the Society's mission, vision, values and lay Catholic heritage.
- **Impact focus:** (Level 1) Contribute to the delivery of positive impact through informed decision making and efficient and effective use of resources.
- **Collaboration:** (Level 1) Work collaboratively with others to solve challenges, foster the Society's mission and implement the Strategic Plan.
- **Change leadership:** (Level 1) Support the implementation of change.
- **Team performance:** (Level 1) Develop own performance and contribute to team performance.

- **Digital engagement:** (Level 1) Effectively participate in virtual, dispersed teams using digital tools.
- **Innovation and improvement:** (Level 1) Contribute to generating new ideas that will improve services and ways of working.
- **Financial acumen:** (Level 1) Use the Society's resources responsibly.

### **Role-specific criteria**

- Relevant tertiary qualification/s in marketing or business and experience Gifts in Wills or a similar donor development role.
- Demonstrated expertise in developing and implementing practices and procedures for stewardship and growth of Gifts in Wills donors.
- Demonstrated ability and expertise in project and operational management to oversee effective implementation of initiatives.
- Excellent interpersonal and relationship management skills, with a proven ability to collaborate effectively with internal and external stakeholders.
- NSW driver licence.

### **Desirable criteria**

- Experience working in a membership-based organisation to support and empower members and volunteers.