

## POSITION DESCRIPTION

**NAME:**

**POSITION:** **BEQUESTS and RESEARCH Manager**

**REPORTS TO:** Head of Fundraising and Marketing

**DIRECT REPORTS:** Nil

**POSITION DESCRIPTION:**

The purpose of this role is to develop, manage and grow the Foundation's Bequest program and Bequest income. The position is an integral part of the Fundraising Team and reports directly to the Head of Fundraising & Marketing, and works closely with the Fundraising Relationships Manager in regard to research and donor prospecting.

**PRINCIPAL RESPONSIBILITIES:**

1. **Lead and develop the WCH Foundation Bequest Program.**
2. **Undertake prospect research for potential bequestors, PAFS, and other high net worth individuals.**
3. **Steward all donors and prospects efficiently and effectively.**
4. **Administer the Bequest Program.**

**OTHER DUTIES**

- Ensure WCH Foundation corporate knowledge is protected by accurate and effective record keeping and database processes.
- Contribute to a safe and healthy work environment, free from discrimination and harassment by adhering to the provisions of the relevant legislative requirements including Equal Employment Opportunity and Work Health and Safety, the Code of Conduct and organisational policies.

**SPECIAL CONDITIONS**

- Some out of hours work may be required as agreed
- May be required to travel intrastate
- Must be prepared to attend relevant meetings with staff and educational activities as required and to participate in the appraisal process;
- Must be prepared to attend WCH Foundation events when required

**KEY RESULT AREAS**

Key result areas for the measurement of success in this position are agreed at the beginning of each year with the Head of Fundraising & Marketing and include the following:

1. **Lead and develop the WCH Foundation Bequest Program.**
  - Develop and document a bequest program strategy to improve and grow the program including prospecting, identification, nurture and stewardship stages with procedures for each stage.
  - Delivery of the set fundraising targets and day to day monitoring of budgets for bequests.

- Work with the Head of Fundraising & Marketing and the Fundraising Team to integrate bequests into the WCH Foundation's overall fundraising strategy.
- Work with the Brand & Content Manager to develop communication and collateral required to meet the objectives of the Bequest program: information booklet and flyers, event invitations, bequest newsletter, online content.

## **2. Undertake prospect research for potential bequestors, PAFS, and other high net worth individuals.**

- Identify potential benefactors from existing donor pool and work with Head of Fundraising & Marketing to develop and implement strategies to secure confirmed benefactors.
- Implement and maintain a robust research program to identify new prospects for both bequests, PAFS and major gifts to inform strategies for high net worth individuals.
- Work with the Fundraising Relationships Manager and Head of Fundraising & Marketing to analyse and communicate the research related to high net worth individuals.

## **3. Steward all donors and prospects efficiently and effectively.**

- Actively monitor and maintain relationships with confirmed bequestors to the highest standard, including face to face visits where appropriate.
- Implement all aspects of the bequest stewardship strategy, including creative methods to engage bequestors in the activities of the WCH Foundation and the Hospital.
- Manage all aspects of the 'Golden Hearts Bequest Society' ensuring that membership is managed to the highest standard including the staging of successful benefactor events.
- Manage the bequest event calendar and events, including the 'Golden Hearts' events and hospital tours.
- Maintain regular communication with potential and confirmed benefactors including telephone calls, visits, thank you and birthday cards.
- Develop a schedule for nurture and stewardship of bequest prospects and benefactors, including face-to-face visits.

## **4. Administer the Bequest Program.**

- Be the first point of contact for all bequest enquiries and requests for information.
- Maintain accurate records and files are maintained in relation to all aspects of across the Bequest program.
- Bequest program targets are achieved or exceeded as per the Bequest Program plan, including number of prospects identified, contacts made, bequests confirmed and events completed.
- Maintain up to date records of confirmed and incoming bequests.

### **PERSON SPECIFICATION**

- Excellent interpersonal communication skills, in person and by phone, combined with a high level of professionalism.
- Ability to prioritise tasks, accept change and remain effective.
- Experience in developing and maintaining relationships with a high degree of maturity and empathy.
- Ability to work to deadlines and within time constraints when necessary.

- A willingness to interface with prospective and confirmed benefactors face-to-face.
- Ability to work unsupervised and to achieve deadlines and targets.
- Proficiency in Microsoft Word, Excel, Power Point and experience in maintaining database systems.
- Experience in working within an effective team and ability to work in an environment based on communication and trust.
- Current South Australian driver's licence is essential.

#### KEY RELATIONSHIPS

**Reports to:** Head of Fundraising & Marketing

**Internal:** All WCH Foundation staff

**External:** WCH Foundation donors, prospective and confirmed benefactors, trustees and the Women's and Children's Hospital.

#### PERFORMANCE & SALARY REVIEW PROCESS

Remuneration levels are based on experience status and performance achieved within the salary range identified for each position. Performance will be assessed on the relative achievement of the Key Result Areas as agreed above.

Performance reviews will be conducted in March of each year.

Salary reviews will be conducted in May of each year.

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Bequest and Research Manager

/ / 2022

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Chief Executive Officer

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