

POSITION DESCRIPTION

BEQUEST MANAGER



STAFF MEMBER:

POSITION TITLE: BEQUEST MANAGER

REPORTS TO: PHILANTHROPY & PARTNERSHIPS MANAGER

DIRECT REPORTS: Nil

POSITION OBJECTIVE

The Bequest Manager is responsible for the growth, development and delivery of the Bequest program and bequest income at the Women's & Children's Hospital Foundation (WCH Foundation). The position is an integral part of the Fundraising Team, reporting to the Philanthropy and Partnerships Manager, and working closely with other Program leads to identify and steward potential bequestors ranging from prospects to confirmed bequestors.

The incumbent will be responsible for both marketing and relationship development across this growing program including acquisition, conversion and stewardship of bequest prospects and supporters. This role requires an aptitude for multi-channel direct marketing, event management and communications, as well an ability to build strong personal relationships with supporters – all with the goal of increasing participation in bequest giving.

The role has influence over the strategy and direction of our Bequest Program as well as the operational delivery of these strategies. The role will work closely with staff across the organisation to maximise opportunities for bequest giving and offers an exciting opportunity to contribute to the WCH Foundation's mission to improve the health and wellbeing of women, children and families in South Australia and beyond.

PRINCIPAL RESPONSIBILITIES

- 1. Lead and develop the WCH Foundation Bequest Program.**
- 2. Manage and grow a portfolio of current and prospective bequestors.**
- 3. Develop strong relationships with benefactors and steward all donors and prospects efficiently and effectively.**
- 4. Administer the Bequest Program including donor journeys and estate management.**

DETAILED RESPONSIBILITIES

1. Lead and develop the WCH Foundation Bequest Program

- Develop and implement strategies to improve and grow the Bequest Program and its pipeline, including prospect, acquisition, conversion and stewardship stages with dedicated journeys and activity developed for each stage.
- Delivery of the set fundraising targets and day to day monitoring of budgets for bequests.

POSITION DESCRIPTION

BEQUEST MANAGER



- Work with the Head of Fundraising, Philanthropy and Partnerships Manager and the Fundraising Team to integrate bequests into the Foundation's overall fundraising strategy. Work with the Marketing and Communications Manager to develop content, communications and collateral required to meet the objectives of the Bequest Program including: printed brochures and communications, event invitations, newsletters, and digital content.
- Undertake prospect research for potential bequestors.
- Identify potential benefactors from existing donor pool and work with the Philanthropy and Partnerships Manager to develop and implement strategies to secure confirmed bequestors.
- Implement and maintain a robust research program to identify new prospects for bequests.
- Develop and implement bequest pipeline journeys.
- Apply best practice principles to improve and develop journeys for supporters at all stages of the bequest pipeline.
- Develop and document a robust and engaging stewardship strategy, including creative methods to engage bequestors in the activities of the WCH Foundation and the Hospital.

2. Manage and grow a portfolio of current and prospective bequestors

- Develop and implement a growth strategy for the Bequest Program using a multi-channel approach including digital (social media, video, web), direct marketing, surveys, personal contact (visits/phone) and events.
- Manage relationships and secure support from an assigned portfolio of prospective and confirmed bequestors.
- Coordinate tours and events that engage supporters more deeply in our work and showcase the impact of gifts in Wills.
- Develop high quality written communications that demonstrate the impact of gifts in Wills and encourage supporters to participate in bequest giving.

3. Develop strong relationships with benefactors and 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.

POSITION DESCRIPTION

BEQUEST MANAGER



4. Administer the Bequest Program.

- Be the first point of contact for all bequest enquiries and requests for information.
- Maintain accurate records and files in relation to all aspects of across the Bequest program.
- Ensure the effective administration of bequest estates including liaison with executors, next of kin and/or legal professionals.
- Utilise NXT prospect tracking and moves management processes to identify, assign, rate and track assigned relationships, complying with department policies and procedures.
- Bequest program targets are achieved or exceeded as per the Bequest Program plan, including number of contacts made, bequests confirmed and events completed.
- Maintain up to date records of confirmed and incoming bequests.

PERSON SPECIFICATION

- An interest in supporting the health and wellbeing of women, children and families.
- Previous experience and/or tertiary qualifications in marketing, event management, communications or fundraising.
- Track record in the design and implementation of projects or programs combining both marketing and relationship management principles.
- Excellent interpersonal communication skills, in person and by phone, combined with a high level of professionalism.
- Experience in developing and maintaining relationships, in person and remotely, with a high degree of professionalism, maturity and empathy.
- Demonstrated high standards of integrity, ethics and confidentiality.
- Aptitude for events, communications and project management.
- Ability to prioritise tasks, 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.
- Ability to maintain accurate database records and run reports (Raiser's Edge NXT experience preferred), proficient with Microsoft Office programs and willingness to learn to use a range of digital platforms.
- 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.
- Hold a current WWCC or be willing to undertake a WWCC.

OTHER DUTIES

- Other duties as may be required from time to time to meet the objectives of the position and the organisation.

POSITION DESCRIPTION

BEQUEST MANAGER



- Contribute to the preservation and protection of the WCH Foundation's corporate knowledge through accurate and effective record keeping and use of the relationship management database.
- 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 hour's work may be required.
- May be required to travel intra/interstate.
- Must be prepared to attend relevant meetings and educational activities as required.
- Must be prepared to participate in the performance development process.

PERFORMANCE & SALARY REVIEW PROCESS

Remuneration levels are based on experience 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. Informal market reviews will be conducted from time to time to ensure the remuneration is competitive.

Performance reviews will be conducted annually.

POSITION DESCRIPTION

BEQUEST MANAGER



KEY PERFORMANCE INDICATORS (KPIs)

KPIs for this position are determined in consultation with the Head of Fundraising & Marketing and Philanthropy & Partnerships Manager as part of the annual appraisal process.

The WCH Foundation supports employee participation in related education opportunities.

Bequest Manager

/ /

Chief Executive Officer

/ /