



Bequest / Relationship Officer

Position Description

Position Title	Bequest / Relationship Officer	Telephone: (02) 9568 0262 Facsimile: (02) 9550 9383
Responsible Council	NSW State Council	Email: vinnies@vinnies.org.au Website: www.vinnies.org.au Donation Hotline: 13 18 12
Reports To	Gifts in Wills & Estates Manager	
Base Location	State Council Office, Lewisham	
Primary position objective	To drive the development and growth of the St Vincent de Paul Society's Gifts in Wills Program. To develop awareness of the organisations need for bequests from known supporters, member groups and the wider community. Identify, manage and cultivate potential benefactors to the Society through a strategic stewardship and conversion program.	

St Vincent de Paul Society

The St Vincent de Paul Society is a member and volunteer based organisation that has been assisting people experiencing disadvantage in NSW for more than 130 years.

The Society was founded by a 20 year old man named Frederic Ozanam in 1833, who with a group of friends, wanted to make a difference to the poverty and disadvantage that he saw around him in post-Revolution France. Leading by example and with boundless energy, Frederic started what is now a world-wide movement in just 20 short years. The St Vincent de Paul Society NSW has around 16,000 members and volunteers and 1480 staff. Our local member networks, referred to as Conferences, are present in over 420 communities across NSW.

Our members and volunteers provide assistance to people experiencing disadvantage including food parcels and vouchers, financial assistance, assistance with energy bills and other debt, budget counselling and the provision of other material items such as furniture, clothing and bedding and any other household items. Importantly, our members also provide vital emotional support and referral services as needed.

The St Vincent de Paul Society is a leading provider of community support services and has close to 100 Special Works across the State in the areas of homelessness, mental health, disability, financial counselling, supported accommodation, food provision, refugees and migrants and addiction counselling.

Our work is funded by all levels of government, the generous support we receive from the community and our 250 Retail Centres across NSW.

Departmental Overview

The role of Bequest / Relationship Officer sits within a well-established fundraising program and reports to the Gifts in Wills & Estates Manager. The Fundraising & Communications (F&C) Department encompasses a range of professional services including fundraising, major gifts, gifts in Wills, events, corporate partnerships, communications and marketing and is dedicated to raising the profile, awareness, funds and support for the 'good works' of the Society.

Duties and Responsibilities

The Bequest / Relationship Officer works closely with another Bequest / Relationship Officer and a Gifts in Wills & Estates Support Officer under the management of the Gifts in Wills & Estates Manager to develop and grow the Gifts in Wills Program in accordance with the Gifts in Wills team annual KPIs and objectives. This is achieved through a comprehensive stewardship, nurturing and conversion program.

Gifts in Wills Program

- Manage a pipeline of confirmed bequestors and potential bequestors through a strategic stewardship program.
- Identify, manage and convert potential bequestors to the organisation, to achieve fundraising and team KPI's and objectives.
- Co-ordinate a formal Gifts in Wills Mailing Program to all potential Bequestors to develop their interest in leaving a Bequest or Legacy.
- Co-ordinate a Mailing 'Nurturing' Program to Prospects, Confirmed Bequestors, Honorary Solicitors, and Persons of Interest and manage accordingly.
- Extend relationships by establishing and maintaining, when possible, a Bequest Heirs Program.
- Ensure all deceased Bequestors and their families are acknowledged appropriately.

Relationships

- Initiate and maintain contact with Bequestors and Prospects through personal visits, letters, phone calls, cards, and special events. (Stewardship Program)
- Initiate and maintain respectful relationships with the Society's supporters.
- Ensure attention to detail and ongoing updates of bequestor notes in system being mindful of how and where the information could be used.
- Respond and follow up efficiently to Solicitors and Trustees seeking Gifts in Wills information.
- Ensure all bequestors are invited to join the 'Vinnies Forever Friends' program and provide appropriate communications and contact.
- Attend funerals and represent the Society where appropriate.
- Provide appropriate response to 'In-Memoriam' 'Gifts of Celebration' donations.
- Work in conjunction with wider F&C team to ensure roll out of Gifts in Wills direct mail and marketing campaigns.
- Work closely with the Gifts in Wills & Estates Manager to identify and refer major donor prospects within the Gifts in Wills pipeline.
- Co-ordinate volunteer programs and volunteers to assist the Gifts in Wills team.

Publications

- Develop a series of useful bequest tools in conjunction with the Gifts in Wills Manager, Gifts in Wills Team and Communications Manager including; Gifts in Wills brochures, booklets, In Memoriam envelopes, cards, and pamphlets.
- Work closely with the Communications team to promote the Gifts in Wills program through media and Gifts in Wills advertising.

Events

- 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 services.
- Work with the Gifts in Wills & Estates Manager to run 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.

Essential Criteria

- Experience in direct Gifts in Wills organisations or in a similar donor development role
- Excellent relationship development and interpersonal skills, including the ability to relate well to a broad range of potential bequestors, and external organisations
- Understanding of, and capacity to apply, appropriate boundaries within a work role
- Strong capacity to strategically analyse and enhance an existing program
- Experience in achieving program goals and targets
- Experience in working autonomously as well as collaboratively
- Effective organizational and administrative skills
- Excellent communication, analytical and customer services skills
- Capacity to work within the Society's ethos, Mission and Code of Conduct
- High level of emotional intelligence and relationship skills
- Current NSW drivers licence and motor vehicle

Desirable Skills

- Willingness to commit to Society goals and objectives.
- Demonstrated understanding of the Not for Profit sector.
- Knowledge of data segmentation and creating digital reports.
- Membership of the Fundraising Institute of Australia Inc. (FIA) or similar organisations is highly desirable

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