

Gifts in Wills Officer

Position Description

Directorate:	Commercial Enterprise, Fundraising and Communications
Reports to:	Manager, Gifts in Wills and Estates
Direct reports:	NIL
Location:	Charles O'Neill State Support Office, Lewisham NSW
Primary position objective:	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, Digital 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 CRM database. Segment data and produce reports from the database.
- Initiate and maintain contact with prospects and bequestors through a stewardship program (personal visits, letters, phone calls, emails 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 Memoriam envelopes, cards and pamphlets.

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 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.

- Manage a group of 500 supporters using multi- channel communications and 6- 8

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 co-ordination 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.