

POSITION DESCRIPTION – TEAM MEMBER

Position Title	Bequest Relationship Specialist	Department	Engagement and Support
Location	Sydney, NSW	Direct/Indirect Reports	0
Reports to	Offline Channel Manager	Date Revised	Nov 2020
Industrial Instrument	Social Home Care and Disability Services Award		
Job Grade	Job Grade 6	Job Evaluation No:	HRC0027035

■ Position Summary

Bequests are a significant revenue stream for Australian Red Cross. This role will lead the implementation of the organisation's bequest strategy with the aim of increasing income, deepening relationships with bequestors and building a robust pipeline.

A key responsibility will be relationship management of confirmed, intending and considering bequest donors to maximise retention rates, conversion and ongoing support. You will work with Fundraising Program Managers and the Partnerships team to identify prospects for conversion and cultivation.

You will represent the interests of the donor and Red Cross in the journey of administering a bequest gift and will be responsible for ensuring that all bequest income entitled to be received by Australian Red Cross is accurately forecasted and that estate distribution occurs within anticipated timeframes.

You will also be the point of escalation for Engagement and Support regarding matters of Wills and Estates, Inheritance Law and contested Estates.

■ Position Responsibilities

Key Responsibilities

- Work with the Offline Channel Manager to ensure delivery of the bequest program including the annual budget, pipeline, growth and relationship strategy
- Implement a multi-faceted targeted program (including digital, direct mail, phone, face-to-face) which identifies, solicits, cultivates and stewards bequest donors
- Collaborate with internal stakeholders to maximise lead generation activities, conversion strategies and retention across programs
- Provide exceptional relationship management and deliver a tailored stewardship journey for confirmed, intending and considering bequest donors
- Identify opportunities to proactively promote the bequest program to the Australian public to cultivate leads and awareness
- Accurately maintain the Red Cross bequest pipeline of projected income and take ownership of financial reporting, including accurate and up-to-date weekly/monthly reports and reforecasts for the program
- Work with Data & Insights team to develop a suite of reports to monitor the performance of and identify improvements to the bequest program
- Ensure all bequest related content is kept up-to-date across different channels and lead development of bequest materials as required

- Oversee administration of deceased estates where Red Cross is identified as a beneficiary, or supporter had indicated a confirmed bequest. Liaise with executors, solicitors, trustees and other charitable beneficiaries (as required)
- Manage relationships with internal and external stakeholders involved throughout the legal administration and distribution of estates including legal counsel. Undertake further activities as required under the direction of Red Cross General Counsel relating to bequests
- Proactively manage legal actions and disputes concerning bequests with an understanding of organisational and legislative issues and sensitivities in managing the affairs of deceased persons and reputational risk for Red Cross
- Represent Red Cross by developing respectful relationships with the next of kin, family and friends of bequest donors
- Ensure that Red Cross receives appropriate notification and entitlements of income under governing Wills and testamentary deeds from perpetual estates
- Maintain and develop the national panel of solicitors who support Red Cross bequest fundraising.
- Ad hoc tasks as requested by the Offline Channel Manager

■ Position Selection Criteria

Technical Competencies

- Demonstrated experience in bequest program management
- Exceptional interpersonal and relationship building skills
- Proven experience in management of financial reporting and budgeting
- Strong knowledge of legal matters and legislative requirements pertaining to bequests
- Developed negotiation skills with experience in mediation
- Highly developed communication and interpersonal skills with the ability to influence key stakeholders
- Demonstrated analytical, problem solving and decision making abilities

Behavioural Capabilities

- **Personal effectiveness | Achieve results** | Demonstrated ability to manage work and achieve the results committed to. Ability to evaluate progress and make adjustments needed to achieve goals. Accept responsibility for mistakes and learn from them.
- **Team effectiveness | Collaborating** | Demonstrated capability to work with others to reach common goals, sharing information, supporting and building positive and constructive relationships.
- **Team effectiveness | Managing performance** | Demonstrated capability to take ownership of work and use initiative to deliver results. Accountable for own performance and ability to set clearly defined objectives for achievement.
- **Team effectiveness | Communicating** | Demonstrated capability to communicate clearly and concisely ensuring messages are understood. Ability to express ideas clearly, listen effectively and provide feedback constructively.
- **Organisational effectiveness | Managing risk** | Demonstrated ability to work within guidelines, policies and procedures. Awareness of risks involved in an individual's role and works toward minimising their impact.

■ General Conditions

All Red Cross staff and volunteers are required to:

- Adhere to the 7 fundamental principles of Red Cross:
Humanity | Impartiality | Neutrality | Independence | Voluntary Service | Unity | Universality
- Act at all times in accordance with the Australian Red Cross Ethical Framework and Child Protection Code of Conduct
- Demonstrate skill, knowledge and behaviour to work with Aboriginal and Torres Strait Islander people in a culturally respectful way
- Comply with the Work Health and Safety management system
- Undertake a police check prior to commencement and every 5 years thereafter. Police check renewals may be required earlier than 5 years in order to comply with specific contractual or legislative requirements
- Support a child safe organisation by undertaking screening for suitability to work with children, youth and vulnerable people and to comply with relevant state/territory legislative requirements
- Assist the organisation on occasion, in times of national, state or local emergencies or major disasters.