

## POSITION DESCRIPTION – TEAM MEMBER

Position Title	Bequest Relationship Specialist	Department	Engagement and Support
Location	Sydney	Direct/Indirect Reports	0
Reports to	Offline Channel Manager	Date Revised	May 2021
Industrial Instrument	Social Home Care and Disability Services Award		
Job Grade	Job Grade 6	Job Evaluation No:	HRC0037891

### ■ Position Summary

Bequests are a significant revenue stream for Australian Red Cross. This role will lead the implementation of the organisation's bequest stewardship and retention 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, Partnerships team and other relevant stakeholders to identify prospects for conversion and cultivation.

Working within a KPI framework you will need to operate within a strategic approach to ensure the future development of the portfolio.

### ■ Position Responsibilities

#### Key Responsibilities

- Work with the Offline Channel Manager to ensure delivery of the bequest program including the growth and relationship strategy.
- Provide exceptional relationship management and deliver a tailored stewardship journey for confirmed, intending and considering bequest donors.
- Collaborate with internal stakeholders to maximise lead generation activities and retention for confirmed bequestors and bequest prospects.
- Manage the Red Cross bequest donor pipeline and the moves management from cold to warm and confirmed, and take ownership of reporting, including accurate and up-to-date weekly/monthly reports and reforecasts for the program.
- Identify opportunities to proactively promote the bequest program to the Australian public to cultivate leads and awareness.
- Respond to all bequest enquiries and work with the Bequest Fundraising Specialist to develop highly personalised donor communications to confirmed bequestors.
- Steward supporters and bequest enquirers to become confirmed bequestors
- Maintain thorough up-to-date records and files relating to bequestors.
- Deliver public presentations to promote Red Cross' bequest program
- Attend bequest stewardship events as required
- Working with the Bequest Administrator be a point of escalation on the 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).

- Working with the Bequest Administrator and the Offline Channel Manager, 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.
- Represent Red Cross by developing respectful relationships with the next of kin, family and friends of bequest donors.
- 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

- Exceptional interpersonal and relationship building skills and respectful ways of working with colleagues across the organization
- Demonstrated experience in retention and stewardship management.
- Excellent collaboration and presentation skills
- Demonstrated analytical, problem solving and decision making abilities
- Highly developed communication and interpersonal skills with the ability to influence key stakeholders.
- Role models excellent behaviours and fosters accountability, passion and trust in team.
- Curious mindset that analyses market and global trends with a courageous approach to innovation
- Expertise across Word, Excel and other relevant software programs
- A commitment to the Fundamental Principles of Red Cross

### 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.

## ■ 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.