

POSITION DESCRIPTION

POSITION CONTEXT			
Job Title	Bequest Acquisition Manager		
Job Family	Fundraising	Date Created	<Month/Year>
Classification	Health Services Manager, Level 4	Employment Status	Permanent
Job Location	Sydney (Darlinghurst)	Weekly Hours	Up to 38 hours per week
Division	St Vincent's Curran Foundation (the Foundation)	Reports To	Director of Bequests and Planned Giving
Direct Reports	None	Budget Responsibility	No
POSITION DETAILS			
Our St Vincent's			
St Vincent's Health Australia (St Vincent's) is a non-profit health organisation founded by the Sisters of Charity in 1857. We are renowned for industry leading research, education and the provision of exceptional and compassionate care. St Vincent's is shaping a future health and aged care system that supports people with life-changing care, wherever and whoever they are. We care for people in our public and private hospitals, at home and in our aged care residences across NSW, QLD and Victoria. Our vision at St Vincent's is that every person, whoever and wherever they are, is served with excellent and compassionate care, by a better and fairer health and aged care system. Our 30,000 exceptional and dedicated staff together lead St Vincent's to deliver three key priorities: - Enhance Impact: Continuously improve our care, enhancing our positive impacts for patients, people, and our planet. - Connect Care: Work together, building "One St Vincent's" capabilities and services to create the future of connected health and aged care. - Transform the System: Work with partners to shape a better and fairer health and aged care system. St Vincent's also recognises its obligations under equal employment opportunity and unlawful discrimination in the workplace legislation, as a minimum standard. We are committed to diversity in the workplace and seek to create an inclusive environment that accepts everyone's differences, embraces their strengths, and provides opportunities for everyone to contribute their unique experiences to the workplace.			
Role Impact			
In partnership with the Director of Bequests and Planned Giving and the Bequest Team, the Bequest Acquisition Manager is responsible for the development and implementation of programs associated with Acquisition and Cultivation for the Bequest Portfolio, including: - Playing a key role in enabling the Foundation to deliver on its mission and objectives by contributing to the development of the Foundation fundraising strategy, with a particular focus on the Bequest Program Strategy. - Implement the bequest program strategy working closely with the Director of Bequests and Planned Giving and the broader Bequest Team to increase fundraising revenue from this source. - Develop and implement activities and initiatives focused on raising the profile of the Bequest Program across the St Vincent's Campus and more broadly in the community - Develop and implement activities and initiatives focused on acquiring new bequestors and securing new bequest commitments - Develop and manage meaningful relationships with bequest donors and prospects, ensuring best practice stewardship during their lifetime - Identify key segments within donor data (e.g. Endowment Donors, St Vincent's Alumni, Patient Opt-Ins, etc) to identify potential bequest prospects and implement appropriate engagement plans.			

- Supporting the development of Bequest communications and collateral to promote the impact of Bequests and educate the broader community
- Efficient Bequest Prospect Management, including 'moves management' and relationship-building, adhering to processes that align closely with best practice Policy & Procedures.
- Ensuring team-wide engagement and support of Bequest Acquisition and Stewardship activity to enable Philanthropy Managers in particular to effectively communicate these opportunities to major donors and prospects.
- Provide support to the broader Foundation, including supporting other fundraising activity as required.
- Strengthening the organisation's values, its commitment to the principles of Catholic Social Teaching and the St Vincent's Health Australia Code of Conduct, through direct role modelling and leadership relating to people
-

All activities undertaken by the Bequest Acquisition Manager must be geared towards helping to achieve ongoing growth of the Bequests Program for St Vincent's Hospitals and facilities in New South Wales.

Managing Today

MISSION AND CATHOLIC IDENTITY

- Promote the mission, vision and values of St Vincent's Health Australia, the St Vincent's Health Australia Code of Conduct, and ensure these principles are effectively integrated in all areas of responsibility.
- Actively contribute to the development of a positive organisational culture, aligned to the mission and values of St Vincent's Health Australia.

BEQUEST DONOR ACQUISITION

- Work closely with the Director of Bequests and Planned Giving to develop and refine a strategic bequest acquisition program to drive ongoing growth in bequest revenue and to secure planned gifts for St Vincent's Hospitals and Facilities in NSW and St Vincent's Curran Foundation.
- Engage with Foundation's Philanthropy and Development teams to nurture relationships with prospects, existing donors, Patient Opt-ins and other supporters with the objective of identifying and growing the Bequest prospect pool, ensuring a strong pipeline of Bequests.
- Identify key segments within donor data (e.g. Endowment Donors, St Vincent's Alumni, Patient Opt-Ins, etc) to identify potential bequest prospects and implement appropriate engagement plans.
- Identify and implement promotional activity to increase awareness of the Bequests Program and the impact of Bequests across St Vincent's with both internal and external stakeholders.
- Identify, engage, qualify and convert bequest prospects into confirmed bequest donors in line with the Foundation Strategic Plan and the agreed annual Key Performance Indicators.
- Work closely with the Foundation's Marketing and Communications team to develop appropriate campaigns, materials and online presence to support bequest acquisition with consistent messaging, regular updates through website and social media.
- Develop a program of presentations, campus tours and speaking opportunities to promote the Bequest program and its impact across St Vincent's Hospitals and Facilities and St Vincent's Curran Foundation.
- As part of the bequest team, act as an ambassador for St Vincent's bequest programs with internal and external stakeholders, strengthening the profile of bequest giving.

- Reporting on effectiveness of Acquisition activities, evaluating the success of programs and undertaking analysis of prospect acquisition and conversion success.

BEQUEST DONOR STEWARDSHIP & ENGAGEMENT

- Relationship manage a portfolio of bequest donors and prospects through to the administration of their realised bequest (Estate administration is allocated by the Director of Bequests and Planned Giving).
- Ensure a holistic and donor centric approach is taken in developing and maintaining excellent relationships with all donors, with a particular focus on growing bequest donors prospects.
- Assist and support the organisation and delivery of key Bequest stewardship events such as the Remembrance Service, Benefactor's Lunch, Bequest-led ISV's, etc
- Implement meaningful engagement opportunities for confirmed bequestors and bequest prospects (e.g. Afternoon Teas, Hospital Tours, Coffee Catch-ups)

GENERAL

- Where assigned, assist with Estate Administration for the Bequest program, including liaising with solicitors/executors/loved ones and ensuring effective record keeping and reporting.
- Support the administration of the general Bequest program, ensuring excellence in record keeping relating to all donor interactions through to the efficient administration of Named Programs, Estates of realised bequests.
- Ensure compliance across all St Vincent's Curran Foundation and broader St Vincent's Policies and Processes
- Ensure compliance with relevant standards of accreditation and legislative requirements and ensure all areas of responsibility operate at all times in compliance with the St Vincent's Health Australia Code of Conduct, relevant legislation, standards and industrial instruments.
- Support the team and contribute to the Foundation's activities as required, which may include travel and work to incidental offsite events within the SVHA Group and/or any approved St Vincent's Curran Foundation corporate function/event.
- Apply and uphold principles of equity and anti-discrimination in the workplace and adhere to organisational and legislative Health, Safety and Environment requirements and help to build a sustainable and values-based culture across the Foundation.

STRATEGY AND STAKEHOLDER ENGAGEMENT

- Work with the Executive Director of Philanthropy and Planned Giving, Director of Bequests and Planned Giving and the Foundation leadership team in the identification, development and delivery of the Foundation's Bequest program.
- Manage Bequestor relationships, as a priority acting as an Ambassador for the Foundation.
- Ensure that high quality relationships are developed and maintained with key internal and external stakeholders.
- Respond to requests for assistance and support from key stakeholders to the agreed standards and timeframes.
- Manage stakeholder relationships for the development and implementation of fundraising activities that deliver strategic outcomes and efficiencies, while operating in an environment of building cooperative relationships. Ensure information relating to funding/ grant opportunities is effectively communicated to the appropriate stakeholders.

COMPLIANCE

- Ensure compliance across all relevant standards of accreditation and legislative requirements within areas of responsibility or as delegated by the CEO and Chief Operating Officer.
- Ensure all areas of responsibility operate at all times in compliance with the St Vincent's Health Australia Code of Conduct, relevant legislation, standards and industrial instruments.
- Operate within the delegated responsibilities and authorities as set by the CEO and Chief Operating Officer.

- Ensure relevant personal qualifications, registrations and memberships are maintained as required.
- Take immediate action to rectify any unsafe situations or acts, report all hazards, incidents and near misses according to relevant policies/procedures.
- In conjunction with the broader team, ensure that the Foundation is compliant with fundraising legislation in each State and Territory.
- Strictly follow the health service's manual handling policy.
- Comply with the Privacy Act by maintaining confidentiality and ensuring that staff, patient or health service information records are not disclosed or misused in any way.

CAPABILITIES – LEVEL 2

Core Capability		Description
Personal	Personal Effectiveness	Plans and Organises – Takes responsibility for accurate, timely work results
	Learning Agility	Adaptability – Identifies personal development needs and seeks information from a range of sources
Outcomes	Patient / Resident-Centred	Patient Focused – Strives to meet and exceed expectations, demonstrating sound judgement
	Innovation & Improvement	Identifies Issues – Contributes to improvement by reviewing strengths and weaknesses of current processes
Strategy	Driving Results	Delivers Results – Manages own workload to deliver results
	Organisational Acumen	Understands Interdependencies – Understands the interdependencies between departments
People	Working With & Managing Others	Monitors Others – Takes responsibility for ensuring productive, efficient teamwork
	Collaboration	Collaborates – Works collaboratively within and outside the team

OUR VALUES

Compassion Our care is an act of love. We are present as they are, and as they need	Justice Our pursuit of what is right and just empowers us to speak and act with courage on behalf of those in need	Integrity Our actions and decisions are transparent and aligned with our values	Excellence Our services are safe and evidence-based, and we continually seek to improve in everything we do
---	--	---	---

Leadership Commitment

- We see and care deeply for the whole person – patient, resident, client, family, carer, teammate. We are radically inclusive.
- We are kind in our thoughts, words, and actions.
- We act with courage, vulnerability, and authenticity.
- We champion equity for those most in need. We battle against inequity and harm to the community.
- We pursue “firsts” – we learn from outside and challenge what’s inside to deliver our best.
- We lead together as One St Vincent’s.
- We are extensively useful, by rolling up our sleeves.

KEY STAKEHOLDERS

Internal	• CEO, St Vincent's Curran Foundation • Executive Director, Philanthropy and Planned Giving • Chief Operating Officer • Director of Bequests and Planned Giving • Foundation team • Foundation Board and Trustees	External • Bequestors • Major Donors • Endowment and other Donors • St Vincent's Sydney Volunteers • Solicitors and Executors • Finance Departments • Clinicians and Allied Health Workers •
-----------------	--	--

EXPERIENCE AND QUALIFICATIONS

Experience, Knowledge, Skills, Abilities, Personal Attributes

EXPERIENCE

- Prior experience with philanthropy and bequest programs, ideally gained within the University, Arts, Medical Research or Healthcare sectors.
- Prior experience with developing prospecting and acquisition programs with an ability to conduct program evaluation and work to KPIs
- Exceptional track record of fundraising and executing fundraising programs and events that deliver real value for an organisation.
- Strong relationship, networking and communication skills that have been developed through working with a broad range of donors and stakeholders.

SKILLS

PEOPLE AND LEADERSHIP

- Collaborative and goal orientated with ability to work as part of a team to achieve results.
- Strong commitment to promote our catholic identity and work within the mission, vision and values of St Vincent's Health Australia, the St Vincent's Health Australia Code of Conduct.
- Strong customer service focus with an ability to maintain collaborative and effective relationships across the organisation.
- High levels of self-motivation, drive and initiative.
- High level of professionalism and personal integrity.
- Ability to represent the organisation to both internal and external stakeholders.

STRATEGIC AND ORGANISATIONAL SKILLS

- Ability to work effectively and collaboratively in a team environment.
- Ability to think strategically and develop initiatives which will deliver desired organisational outcomes.
- Highly organised, able to manage numerous projects simultaneously and good attention to detail, while also understanding the bigger picture.
- Demonstrated ability in developing acquisition programs and implementation using various marketing channels to drive engagement and promote the program.

TECHNICAL

- Demonstrated understanding of the fundraising and philanthropy sector with experience in bequest fundraising, prospecting, moves management, donor development, acquisition and stewardship.
- Excellent written and verbal communication and presentation skills
- Excellent reporting and analytical skills.
- Highly developed computing skills.
- Experience using a CRM system with NXT/Raiser's Edge preferred

Minimum Education Requirements

- Tertiary qualification in Business, Marketing, Fundraising or relevant subject area; or equivalent experience.

Identified Position

<Yes OR No>

PRE-EMPLOYMENT / APPOINTMENT SCREENING REQUIREMENTS

Immunisations

Category B (non-clinical-facing)

St Vincent's has a duty of care under work health and safety legislation to eliminate and/or control the risk of transmission of vaccine preventable diseases (VPD) in healthcare settings. You therefore must comply with the St Vincent's Immunisation Policy, which, depending on the role you perform in the organisation will require you to undergo certain immunisations/vaccinations (e.g., Covid-19 and flu vaccinations).

Physical Requirements

Office environment

Other Pre-Employment or Appointment Screening Requirements

St Vincent's requires that a reference check, 100 points of identification check, right-to-work check and a Nationally Coordinated Criminal History check (NCCHC) are undertaken for all roles.

REVIEWED BY

Name: <Manager name>

Position Title: <Manager position title>

EMPLOYEE SIGNATURE

Name:

Signature:

Date: