

Position description

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| Position title: | Gifts in Wills Officer |
| Employer: | Baker Heart and Diabetes Institute |
| Department: | Community and Corporate Relations |
| Supervisor/Manager: | Gifts in Wills and Estates Manager |
| Level: | Full-time (Part-time will be considered) |
| Date: | March 2024 |

Background

The Baker Heart Diabetes Institute is Australia's only medical research institute focused on the diagnosis, prevention and treatment of diabetes and heart disease.

Team

The Community and Corporate Relations (CCR) team is responsible for fundraising and philanthropy with an aim is to provide significant and sustainable funding to the Baker Heart Diabetes Institute to enable it to achieve its research and health care vision and mission. Fundraising plays a crucial role in supporting research and clinical study outcomes and other health initiatives at the Baker Institute.

Programs include:

- Direct Marketing — renewal, retention, acquisition, regular giving, database management, donor administration.
- Bequests — gifts in wills and bequests in perpetuity.
- Major Gifts — relationships with high-net-worth individuals and private trusts.
- Trusts and Foundations — grant submissions to philanthropic trusts and foundations.
- Corporate Partnerships — sponsorship, endorsement, industry and commercial arrangements that progress our mission.
- CCR is also responsible for communicating and engaging the broader community in the work of the Baker Institute.
- CCR also facilitates the perspectives of those impacted by heart disease and diabetes informing our research through the consumer/community engagement program.
- The CCR team work closely with the Public Affairs team, who have responsibility for a range of communications, from media relations and internal communications to issues management, marketing and government relations.

Nature of environment

The Baker Institute has a project-oriented environment, encompassing a local and multi-site (including interstate) organisational structure. The staff comprise mainly research, scientific and specialist clinical personnel engaged in the capacity of permanent, grant specific and casual employment.

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The atmosphere of the CCR team is collegial, usually relaxed and informal though busy and often dynamic with frequent deadlines that must be met. The environment is often demanding and challenging with a strong team orientation but also provides the opportunity to work independently and show initiative. The nature of the work also requires a focus on accuracy and detail.

Core to the way the CCR team operates is a deep appreciation for those who support our work and a desire to ensure they experience a sense of accomplishment and satisfaction through the related interactions.

Travel requirements

- Interstate and local travel as required.

Key job requirements, responsibilities and duties

The Gifts in Wills Officer works within the Gifts in Wills Team to build a sustainable Bequest development program by effectively prospecting, cultivating and soliciting gift in Will prospects, through the principles of fundraising moves Management. These donor engagement actions are combined with the provision of the highest levels of donor stewardship and service for confirmed gift in Will supporters (Baker Institute Legacy Society members) to maintain and develop their annual giving levels.

The role will focus on soliciting gifts in Wills from the Baker Institute's donor pool and the wider community through direct mail, email, telephone engagement, targeted functions, information sessions and other initiatives.

The Gifts in Wills Officer has responsibility for maintaining timely and accurate records in the fundraising database of contact with donors and other external relationships, while ensuring compliance with all relevant Privacy and Fundraising Legislation.

The role works collaboratively with other fundraising programs to optimise donor engagement and overall fundraising revenue.

Key accountabilities

| Key operational focus | Key performance indicators |
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| <p>1. Increase the number of confirmed gift in Will donors to the Institute.</p> <p>1.1 Maximise future gifts in Wills revenue by increasing the number of confirmed gift in Will supporters (Baker Institute Legacy Society members) and increasing the proportion of the active donor base who are committed Baker Institute Legacy Society members.</p> <p>1.2 Produce regular (e.g. fortnightly) plans of proposed activity for agreement with the GIW and Estates Manager as requested.</p> <p>1.3 Report regularly on donor stewardship, cultivation and solicitation results as requested.</p> | <ul style="list-style-type: none">▪ Gift in Will donor development plans agreed and approved by GIW and Estates Manager.▪ Number of committed gifts in Wills supporters achieves operational objectives.▪ Retention and annual giving rates of Baker Institute Legacy Society members achieves operational plan and objectives.▪ Demonstrated donor giving upgrades and conversion▪ Plans of activity agreed with the GIW and Estates Manager.▪ Activity levels delivered to schedule, including number of donor engagement actions and solicitation outcomes.▪ Regular reports delivered on time.▪ Evidence of integration with other fundraising programs. |

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| | <ul style="list-style-type: none"> ▪ Demonstrated stewardship actions and retention levels. |
| <p>2. Develop relationships with existing, new, and potential gifts in Wills supporters, information seekers, etc.</p> <p>2.1 Reply to all requests for further information and follow up as required.</p> <p>2.2 Encourage and inspire donors to consider leaving a gift to the Baker Institute in their Will (ideally residual).</p> <p>2.3 Engage in a planned process of converting prospects to considerers/intenders.</p> <p>2.4 Ask considerers/intenders for the gift in Will confirmation.</p> | <ul style="list-style-type: none"> ▪ Initiatives conducted to foster donor relationships to ensure Baker Institute Legacy Society members remain engaged in the work of the Institute. ▪ Stewardship levels effectively implemented to steward Baker Institute Legacy Society members through personal contact - predominantly telephone, mail, email, and targeted donor functions. ▪ Queries responded to/GIW packs mailed/emailed in timely manner, max. 2 working days. ▪ Number of GIW solicitations and confirmed Baker Institute Legacy Society members. ▪ Number of residual confirmed Baker Institute Legacy Society members obtained. ▪ Numbers of living confirmed GIW donors retained. ▪ Giving levels of living confirmed GIW donors achieve appeal/annual targets. ▪ Volume of donor engagement and steward actions. |
| <p>3. Maintain accurate records and provide regular and consistent reports.</p> <p>3.1 Ensure data and information from supporter contacts are recorded in Salesforce database accurately and in a timely manner.</p> <p>3.2 Ensure gift in Will donor engagement activities comply with all applicable Australian laws and regulations, Baker Institute Policies and Procedures, fundraising legislation, standards, and codes of conduct in relation to members of the public, supporters and donor communications, data collection and transfer, and gift processing.</p> | <ul style="list-style-type: none"> ▪ Salesforce records kept up-to-date and reflect a true account of activity and results. ▪ Donor records and reports maintained appropriately. ▪ Timely and accurate reports provided. ▪ Donor engagement actions accurately recorded in Salesforce. ▪ All donor records and reports are actioned in-line with relevant privacy and fundraising policy and legislation. ▪ All donor engagement actions are compliant with relevant privacy and fundraising policy and legislation. |
| <p>4. Work collaboratively with other members of the fundraising team to maximise revenues across income streams.</p> | <ul style="list-style-type: none"> ▪ Evidence of integration. ▪ Receives positive feedback from colleagues. ▪ Demonstrates stewardship actions and retention levels of confirmed Bequestors annual giving. ▪ Annual giving levels of confirmed Bequestors achieve appeal/annual giving targets. ▪ Actively participates in all department activities to generate a positive team environment and synergy. ▪ Receives positive feedback from EGM, GIW Manager and team members. |
| <p>5. Ensure positive working relationships with internal and external stakeholders including:</p> | <ul style="list-style-type: none"> ▪ Demonstrates effective communication with all stakeholders. |

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| | <ul style="list-style-type: none">Receives positive feedback from internal and external relationships. |
| 6. Other duties as required. | <ul style="list-style-type: none">Actively participates in department activities contributing to a positive team environment.Attends professional development activities as approved.Willingness to carry out other duties to maintain an efficient and professionally run fundraising office.Supports the fundraising staff during donor functions/events if/when required.Supports the fundraising team in servicing donor requirements if/when required |

Meet statutory requirements of the company

Employees of the Baker Institute must comply with and maintain up to date and accurate knowledge in:

- OHS legislation
- EEO legislation
- Privacy legislation
- Confidential Information Policy
- Baker Heart and Diabetes Institute Code of Conduct
- Baker Heart and Diabetes Institute Values
- Australian Code for the Responsible Conduct of Research
- Baker Heart and Diabetes Institute Intellectual Property Agreement.

Requirements of position holder

Essential criteria

- Demonstrated experience in donor development and solicitation.
- Excellent telephone manner.
- Excellent communication, collaboration, and negotiation skills, with the ability to relate sensitively to people, especially people of a senior age — especially via the phone and email.
- Strong written communication abilities.
- Competent in maintaining donor contact information for consistent and regular recording and reporting of engagement activity
- Demonstrated ability to work productively both autonomously and as a member of a team.
- Sound knowledge of using fundraising databases (ideally Salesforce) and Microsoft Office suite.

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Desirable

- Gifts in Wills experience.
- Knowledge of Bequest terminology and processes.
- An interest in diabetes and heart disease research and treatment.

Summary of position

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The Baker Institute is an Equal Opportunity Employer and we encourage interest from Aboriginal and Torres Strait Islanders and members of the LGBTIQ+ community for roles within the Institute. We value diversity, inclusivity, gender equity and we promote family-friendly practices. We are a proud recipient of an inaugural Athena SWAN Bronze Award from Science in Australia Gender Equity (SAGE).