

Bequest Coordinator

Reports to: Bequest Manager

Direct reports: Nil

The Organisation

Sydney Children's Hospitals Foundation (SCHF) is a leading children's charity, working to inspire the community to support sick kids to live their healthiest lives. All employees and volunteers of the Foundation are expected to fully support the SCHF purpose, guiding principles and values in their work and interactions with all internal and external stakeholders.

Our Vision: **Healthy Kids...Whatever it takes**

Our Purpose: *Connecting the world's best paediatric research and practice with donors who are inspired by the ability to create change*

Our Guiding Principles

Every relationship matters – each is built on kindness, integrity and respect. Working in partnership we connect funds with the greatest need for the maximum impact. We ensure our donors learn of the impact of their gifts on sick kids and their families. We are inspired by children and families and together, with our community, we aim to cure and we always care.

Our Values: **We are Courageous, Collaborative, Supportive and Accountable**

The Position

The Bequest Co-Ordinator is responsible for assisting the Bequest Manager to increase the number of individuals who choose to leave a bequest to the Sydney Children's Hospital Network (SCHN) and in managing the retention and stewardship of these donors.

This includes delivering donor engagement activities that reinforce engagement and provide acquisition opportunities and/or donor recognition.

The Bequest Co-Ordinator also assists with administration of realised estates, from notification, to receiving funds and ensuring recognition for bequest donors appropriate to their needs and interests.



Together
we can do amazing things
for sick kids

Specific Responsibilities:

BEQUEST PROGRAM

- Assist in implementation of the bequest program.
- Implement bequest donor acquisition activities.
- Use supporter engagement channels to gather prospective donor information and build engagement.
- Keep up to date with current bequest research and developments in the field of philanthropy.
- Review and maintain an appropriate level of knowledge regarding the legal issues of estate planning and administration.

RELATIONSHIP MANAGEMENT

- Assist to manage, maintain and regularly engage with bequest donors and prospective donors through a series of activities and events to ensure donor opportunities are maximised and income targets identified in the Fundraising Strategic Plan are achieved.
- Follow-up information requests from potential bequestors in a timely, professional and sensitive manner.
- Assist in implement the Foundations bequest recognition program.
- Assist with management of key stakeholder relationships including trustees, legal and financial professionals and executors.
- Build and maintain a personalised relationship with each bequest donor built on mutual respect and sensitivity to the donors needs and interests.
- Manage expectations of donors, executors and families in relation to acknowledgement and recognition.

ESTATE ADMINISTRATION

- Assist with management of realised estates under direction of the Bequest Manager.
- Ensure documentation such as probate and financial statements from realised estates are received in accordance with legislation.
- Assist with preparation and execution of affidavits as required for realised estates.

Key Relationships

Internal: SCHF staff

External: Estate Managers, Estate brokers, Donors and perspective donors, legal and financial professionals



Together
we can do amazing things
for sick kids

Selection Criteria

1. Demonstrated understanding of bequest marketing principles, techniques and strategies, and experience in a similar role in a not-for-profit/ fundraising organisation.
2. Advanced interpersonal skills including the ability to relate to highly emotional situations and families with compassion and understanding.
3. Strong administration and organisational skills, and an ability to manage time and project deliverables effectively.
4. Proven high level written communication skills, including the ability to write and interpret legal documentation.
5. Advanced oral communication skills, including the ability to negotiate and be persuasive, and experience in making engaging presentations.
6. Proven experience in dealing with situations that require a high standard of integrity, ethics, judgement and confidentiality, including the ability to discuss life planning.
7. High level computer skills in the Microsoft Office suite (particularly in Word, Excel, and Outlook) and previous experience using databases.
8. Demonstrated ability to work effectively as part of a team and to collaborate across teams to achieve enhanced outcomes, including a demonstrated ability to adapt to changing circumstances, work processes and working hours.



Together
we can do amazing things
for sick kids