

# GIFT IN WILLS COORDINATOR

Oxfam is committed to preventing any type of unwanted behavior at work including sexual harassment, exploitation and abuse, lack of integrity and financial misconduct; and committed to promoting the welfare of children, young people and adults. Oxfam expects all staff and volunteers to share this commitment through our code of conduct. We place a high priority on ensuring that only those who share and demonstrate our values are recruited to work for us.

<b>Position Number</b>	212
<b>Classification</b>	Category 4
<b>Section/Unit</b>	Fundraising and Resource Growth / Supporter Activation
<b>Reports to</b>	Gift in Wills Manager and such other persons as directed
<b>Hours of Work</b>	35 hours per week, <i>flexible</i>
<b>Suitable for Job Share</b>	YES
<b>On Call Duties</b>	NO

### Scope of Position

The Fundraising and Resource Growth Section at Oxfam Australia engages and mobilizes the Australian public, policy makers and supporters to support Oxfam Australia's programs, advocacy and campaigning. As part of high performing Fundraising team that is implementing a plan to grow income, you will contribute to achieving and exceeding fundraising targets so that Oxfam Australia can deliver the organisation's vision of a future free from poverty.

The Gift in Wills Coordinator develops awareness of the agency's need for bequests from supporters, members, groups and the wider community. The role identifies, manages and cultivates bequestors and potential bequestors. The role is also responsible for managing estates where Oxfam is a beneficiary, corresponding with solicitors and executors.

### Key Responsibilities

- Build strong and long lasting relationships with existing and potential bequestors through personalised letters, phone calls and where appropriate special events and visits
- Successfully convert direct marketing generated bequest leads through timely and personalised telephone, email and/or mail follow ups
- Assist with the preparation of bequest letters, telephone scripts and other communications as required

- Ensure all bequestors on the pipeline and those in the confirmed pool are kept connected to Oxfam's work.
- Maintain accurate records of activities and results on the agency's CRM, Salesforce
- Help enhance internal attitudes to bequest giving
- Cross-sell with other aspects of fundraising, working with the Major Gifts & Special Supporter Teams to identify and engage prospective bequestors
- Help monitor general industry and competitor trends and interpret how they can be used to improve bequest marketing
- Maintain an effective register of all estates, track incoming and expected estate distributions, liaise with Oxfam's Legal Team and correspond with solicitors and executors during the administration of estates, including contested matters.
- Producing regular bequest income/forecasting reports
- Review and check estate accounts ensuring that Oxfam receives all income due and negotiate with solicitors where necessary
- In case of contentious legacies produce summaries and recommendations for the Legal Team and Fundraising Leadership
- Ensure up to date records of bequest details on the donor database
- Other related duties as delegated

### **Living our Values**

- Accountability – You are able to set clear goals and monitor personal progress against them.
- Empowerment – You are capable of having open, honest and respectful dialogue with others, respecting and including partnerships and communities perspectives into our working activities.
- Equality – You work to high ethical standards and treat all people with respect.
- Inclusiveness – You embrace diversity and able to enrich work activities with diverse perspectives.
- Sustainability – You are committed to achieving sustainable results in all aspects of their work.

### **Technical Knowledge & Experience**

- Experience in bequest marketing and/or administration
- Knowledge of a range of relationship development techniques
- Experience working with relational databases such as Salesforce
- Knowledge of our work and community development issues (desirable)
- Exemplary levels of sensitivity, empathy and judgement, appropriate to working with high valued supporters, including the ability to manage highly personal and confidential information

## **Personal Skills & Attributes**

- Excellent interpersonal and communication skills
- Negotiation and objection handling skills
- Confident sales skills including the ability to effectively convert hesitant supporters/customers
- Customer service/stewardship, ability to nurture
- High level of computer literacy particularly MS Office
- Time management and personal organisational skills
- Capable of interacting with a wide range of people
- Ability to work independently and as part of a team
- Ability to work under pressure and meet tight deadlines
- Commitment to Oxfam's purpose, culture and ways of working
- Customer and goal focus
- High degree of emotional intelligence and humility
- Growth mindset and desire to cross skill
- Flexibility in work undertaken in order to assist colleagues and the organisation
- Sensitivity to cultural differences and gender issues, as well as the commitment to equal opportunities.
- Openness and willingness to learn about the application of gender/gender mainstreaming, women's rights, and diversity for all aspects of development work.
- Commitment to Oxfam's safeguarding policies to ensure all people who come into contact with Oxfam are as safe as possible.

## **Travel**

Occasional international and/or interstate travel is a requirement of the position. It is a condition of employment that staff abide by all agency security and safety protocols, policies and procedures and the Oxfam International Security Protocol.

## **Child Safeguarding**

As an agency undertaking work both nationally and internationally and in humanitarian response, OAU takes its duty of care seriously to safeguard children and recognises that it must meet community expectations and the trust placed in its personnel to maintain the highest standards of conduct with children. Therefore, all positions within OAU are required to understand and comply with the Child Safeguarding Policy, Code of Conduct, toolkit and and Social Media User Policy.