



Position Description

Position title: Relationship Manager – Gifts in Wills
Reporting to: Philanthropy Manager
Staff reporting: None

Our context

Wellington City Mission (WCM) is a community organisation that has been supporting those in need in the Wellington region through the provision of social services since 1904. In recent years, the Mission has grown significantly and is completing an exciting capital campaign raising funds for a building development in Wellington; Whakamaru.

Our vision

People and communities empowered, transformed and experiencing fullness of life.

Our values

Aroha / Love

Tūmanako / Hope

Whanaungatanga / Kinship

Manaakitanga / Generosity

Purpose of the role

The Relationship Manager – Gifts in Wills sits within the wider Fundraising and Relationships team, which has the overall purpose of raising funds for WCM as well as generating community engagement.

The Relationship Manager Gifts in Wills is responsible for developing and implementing a Gifts in Wills strategy, including the development of a targeted program to identify, cultivate and solicit bequest prospects and move prospects through a bequest pipeline. This is both a strategic and hands-on role which requires an understanding of best practice in gifts in wills fundraising and relationship building using different channels of communication. The role is responsible for maintaining long-term strategic donor relationships, development of bequest prospects, successfully generating sustainable future revenue.

Representative responsibilities and outcomes

Responsibility	Outcome
Strategic Direction	
Develop effective strategies for increasing targeted and general funding through best practice philanthropy.	Support for WCM's services and operations increases year on year, ensuring all effort is made. WCMs current operations and future growth are sustainably resourced.
Understand, support, and enhance WCM's ethos, values and relation-focused approach	All donors feel respected and valued as partners in WCM's mission. All donors recognise WCM's values of aroha (love), Tūmanako (hope), Whanaungatanga (kinship) and Manaakitanga (generosity) in all their interactions with WCM. WCM's reputation is enhanced.
Wills and Bequests relationships	
Manage a portfolio of bequest donors and prospects	Research best ways to approach prospective donors, (including phone calls, visits, bespoke mailings etc), make contact with people, and develop and build genuine relationships. Development and implementation of a multi-channel growth strategy for bequests, designed to deliver new bequest leads. Implementing the bequest strategy, including multiple channels of communication. Collaborating with the Individual Giving team and other internal stakeholders to identify bequest prospects, maximise and integrate bequest lead generation activities, relationship building strategies and retention.
Deliver excellent relationship management	Donors regularly receive personal contact. Donors have been hosted at WCM for tours, meetings have been conducted at donors' homes, offices, and meeting places. Strong relationships have been built with donors. Proactively raise the topic of bequests with donors, and in donor materials.
Reporting and trend monitoring	Reporting on and forecasting bequest growth and income. Monitoring trends and best practice in Gifts in Wills fundraising to inspire growth of the bequest program.
Information capture	Maintaining all account-based information regarding supporters and prospects in the CRM system, including account details, value, opportunities, contact and activity planning, communications and reporting.
Contribute to the wider team	Actively contributing to achieving the overall Philanthropy team and broader Fundraising team goals by leveraging opportunities and proactively collaborating on engagement opportunities.
Future proofing	Research and review effective bequest collateral, and create new materials to capture best practice. Create letter templates, a brochure, bequest pack etc Work with a buddy in the Fundraising and Relationships team to ensure knowledge and expertise is grown wider.
Events	
Donor recognition	Donors have been informed progress and milestones of any new ventures, and invited to events.

	Gifts have been acknowledged in ways agreed with the donor. Recognition letter / certificate or legacy gift is presented.
Events are organised, and carried out to raise funds and engage donors.	Successful organisation of events for events where appropriate Support of events being run within the team Leading events of high opportunity where demand exists
Organise special events for bequestors and prospects	Special events such as a Christmas function or Morning Tea are held. The person feels a sense of care, respect, appreciation and partnership.
Support future Campaigns	Contribution and support have been given to all aspects of any future campaigns. Tasks given by your manager have been completed where appropriate.
Administration	
Ensure that all communications are received and acted upon in a friendly, efficient, and appropriate manner. Donor records are maintained.	Donor enquiries and requests have been responded to promptly, courteously, and efficiently, and people are made to feel welcomed, cared for, and informed. Donor records on the database have been updated with notes on every interaction. The person is kept informed of The Mission's work. The person receives the Mission newsletter, Annual Review and other appropriate Mission publications. Special occasions such as birthdays are appropriately acknowledged.
Process incoming notification of Bequest donations	Liaise with executor of the will in a timely manner, and prepare and send acknowledgement letters to the family. Update Philanthropy Manager of all notified bequest donations.
Continually seek ways to improve efficiency.	Areas of need have been identified and evaluated, and effectiveness of work has been improved. Work has been performed following best practice, and guidance from the Manager.
Measures	Number of confirmed Gifts in Will by supporters. Number of contacts with an interest in Gift in Wills.
Values and health and safety	
Demonstrate WCM's Kaupapa and values	All tasks and interactions are carried out in ways that are consistent with WCM's Kaupapa and values.
Comply with WCM's health and safety practices and processes	Hazards are identified and controlled in line with WCM's health and safety management. Incidents are reported promptly and according to WCM policy and practice. The position holder and those they work with are kept safe.

Person specification

Ideally experienced in or transferable skills	Desirable
Knowledge and experience	

Experience in a non-profit environment with a focus on raising funds.	Experienced in developing and implementing integrated strategies designed to grow interest
Demonstrated experience in initiating, nurturing, and developing relationships	Budget management experience
Experience in organising events	Good time management, administrative and office management skills
Demonstrated ability to work independently, as well as with a team to achieve goals	Track record of relating to people from a diverse range of backgrounds
Current full car drivers' licence	Be data driven
Have excellent verbal and written communication, presenting and promotion skills	Working knowledge of principles of privacy and confidentiality
Attributes	
Enthusiastic and optimistic	Motivated, with a great work ethic
Able to build rapport with a wide range of people and personalities	Honest and trustworthy
A positive, can-do attitude	A dedicated team player
An interest in people	Problem-solver and creative thinker

Key relationships

Inside WCM	Outside WCM
Fundraising Team	WCM Supporters
Communications Team	WCM beneficiaries
Other WCM staff across all facilities	Wider Wellington public

Authorities

Financial	Personnel
Expenditure for programme	

Place and hours of work

From November 2024 the normal place of work will be Wellington City Mission's new building Whakamaru, in Mt Cook, Wellington. The position holder may be required to work elsewhere from time to time according to the needs of WCM. WCM may also vary the normal place of work as long as the variation is reasonable. The position requires a full NZ driver's licence.

The role is part-time at 24 hours per week. Normal hours are worked between 8am and 6pm, Monday to Friday unless otherwise agreed with the manager. This role can be performed within 3 full days, or spread over 4 or 5 days, as suits.