



## CHRIST'S COLLEGE CANTERBURY

Each boy at his best.

### POSITION DESCRIPTION

#### **Bequest & Donor Relationship Manager (1.0 FTE)** *Schedule of Responsibilities and Person Specification*

**Responsible to:** Director of Advancement

**Report To:** Director of Advancement

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#### **Purpose statement**

The Bequest & Donor Relationship Manager will develop and implement high-value donor relationships as part of the Advancement Team at Christ's College. As a hands-on team player, they will work diligently to build a sustainable 'culture of giving' (time, talent, and treasure) to achieve the Advancement Office targets set annually, with specific responsibility for generating bequest and major donor outcomes. As an experienced fundraiser, they will develop significant relationships with prioritised and prospective donors to realise each donor's philanthropic ambition as well as working to grow defined revenue streams that enable Christ's College to further fulfil its vision. As an inspiring team player, they will work to establish relationships with others to empower these objectives, including building a community of donors, alumni and ambassadors who support the mission and vision of Christ's College.

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#### **Functional Relationships**

##### Internal:

- Executive Principal
- Director of Advancement
- Senior Development Manager
- Alumni Manager
- Advancement Team
- College Executive
- Director of Finance & Operations
- Accounts Receivable & Payable

- Christ's College Board of Governors
- Colleagues at Christ's College

External:

- Christ's College Alumni
  - Christ's College Old Boys' Association (CCOBA)
  - Parents
  - Donors and prospective donors
  - Sponsors
  - Trusts and Foundations
  - External groups associated with the Christ's College community
  - FINZ, Educate Plus, CASE
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### Key result areas

- Growth of **confirmed gifts in Wills** to Christ's College and associated membership of The Sewell Society
  - Growth in the number of **high-value donor relationships and corresponding outcomes** that support the unmet and future needs of Christ's College
  - Contribute to building a **sustainable 'culture of giving'** of time, talent, and treasure among those able to positively influence philanthropic outcomes at Christ's College
  - Make a positive contribution to the **Advancement programme and team**
  - Establish **authentic, long-term donor relationships**
  - Develop, support and lead **donor-centric/led initiatives**, and **high-value fundraising**.
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### Job responsibilities

#### 1. Develop and lead an effective bequest programme

**Goal:** Identify, develop, research, and manage a pool of prospective Gift in Wills donors, nurturing those relationships in order to implement and manage an effective and sustainable Gifts in Wills programme.

#### Primary tasks and responsibilities:

- Redefine goals and objectives for the Gifts in Wills programme and create a Gifts in Wills Case for Support
- Write appropriate messaging and ensure consistent and effective messaging is available online and offline
- Review the Christ's College database regularly to identify prospective Gifts in Wills supporters. Research and qualify prospective supporters of this programme based on age, frequency of giving and relationship with Christ's College
- Nurture and support relationships with existing commitments to leave a gift in their Will through annual visits and personal communication
- Work to establish a portfolio of an additional 100 prospective Gift in Will donors

- Cultivate Gift in Wills interest, support and engagement
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  - The Sewell Society events
  - Face-to-face meetings
  - Presentations to associated special interest groups, where appropriate
  - Develop cultivation strategies for each potential Gift in Wills donor
- Establish advocates to encourage others to give through Gifts in Wills from among those who have confirmed their intention to support Christ's College this way
- Engage and work with professional advisors involved in the process of confirming Gifts in Wills.

## **2. Research and build on the existing Major Gift programme**

**Goal:** Alongside the Senior Development Manager, identify, research and manage a pool of defined prospective, significant supporters to nurture and grow those relationships in a manner that will fulfil donor aspirations and improve philanthropic revenue outcomes for Christ's College.

### **Primary tasks and responsibilities:**

- Define goals and objectives for the existing Major Gift programme based on the Advancement strategy, considering and including any overlap with anticipated capital campaigns and/or prioritised projects
- Manage a Major Donor portfolio
  - Co-manage with the Senior Development Manager existing major donor relationships and support existing advocate involvement
  - Review the database and initially identify 30–40 prospective major donors based on previous and potential giving value, as well as history and frequency of giving
  - Research, qualify and manage major donor relationships, including the use of a moves management process, that supports donors achieving their philanthropic ambitions through the relationship with Christ's College
- Cultivate relationships and engage major donors
  - Face-to-face meetings to determine their philanthropic aspirations
  - Ongoing direct personal engagement with significant donors to develop awareness of and interest in the vision of Christ's College
  - Develop cultivation strategies for each potential major donor, including tours of the school hosted by College leadership and/or Trustees, as well as other forms of direct involvement aligned with their interests
  - Organise small group events to engage current and prospective major donors
  - Personally ask, when appropriate, for specific and qualified major gift donations
  - Utilise and manage influential and affluent advocates when available and appropriate
  - Plan and implement stewardship strategies to maintain key donor relationships.

### **3. General responsibilities within the Advancement Office environment**

**Goal:** Support and encourage an effective Advancement Office team and working environment by positively contributing effective key stakeholder engagement and fundraising outcomes.

#### **Primary tasks and responsibilities:**

- Assistance with sponsorship and fundraising programmes, community and event engagement
  - Identification and management of third-party opportunities to build on the Development programme
  - Management of monthly reporting of activity and results
  - Participation in weekly work-in-progress meetings
  - Working with the Advancement Administrator to ensure the Development portfolio is updated and has strong data integrity
  - Liaising with the Director of Advancement, Graphic Designer/Marketing Assistant and College writers to deliver integrated and seamless communications
  - Participation in relevant professional development.
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#### **Performance criteria**

The role of Donor Relationship Manager is being done well when:

- Authentic donor relationships are nurtured, encouraged, and fulfilling for donors
- Tasks are completed on time with allocated resources and to the standard and quality required and expected
- Goals for each key result area are met and both financial and non-financial targets (as annually defined) are met
- A donor-centric approach is demonstrated through all aspects of work
- Up-to-date records of all constituents, meetings, donor engagement and actions are kept and properly maintained in the database
- Excellent relationships with internal and external stakeholders are established and maintained
- Effective leadership is demonstrated as part of the Christ's College Advancement Office Team, and a level of independence and initiative is evidenced in anticipation of likely challenges, proposing of solutions, and responding positively on day-to-day issues
- The Director of Advancement and, where appropriate, the Executive Principal, is briefed on issues as they arise
- Professional and consistent monthly reports are provided for the Director of Advancement as required.

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### **Key metrics that will be evaluated in the annual performance review will include**

- The number of qualified prospective Gifts in Will donors being engaged and managed, as well as the corresponding indications and formalisations of new Gifts in Wills
  - The number of existing Gift in Will donor relationships being nurtured and supported
  - The number of qualified prospective major donors being engaged and managed, leading to an improved understanding of their philanthropic interests and ambitions
  - The number of proposals, asks and presentations seeking generous financial support of Christ's College
  - The number of effective external relationships collaborating through supported advocacy for a generous culture of giving at Christ's College.
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### **Core competencies**

#### **1. Donor/Volunteer Focus**

Making donors and their needs a primary focus of one's actions; developing and sustaining productive donor and volunteer relationships.

#### **2. Hands-on, independent multi-tasker**

Essential to be able to multitask effectively and independently.

#### **3. Contributing to Team Success**

Actively participating as a member of a team to move the team towards the completion of goals.

#### **4. Work standards**

Setting high standards of performance for self and others; assuming responsibility and accountability for successfully completing assignments of tasks; self-imposing standards of excellence rather than having standards imposed.

#### **5. Communication**

Clearly conveying information and ideas through a variety of media to internal and external stakeholders, as appropriate, and in a manner that engages the audience and helps them understand and retain the message.

#### **6. Continuous Learning**

Actively identifying new areas for learning. Regularly creating and taking advantage of learning opportunities; using newly gained knowledge and skill on the job and learning through their application. Having achieved a satisfactory level of professional skill or knowledge in position-related areas, keeping up with current developments and trends in areas of expertise.

**7. Decision-making**

Identifying and understanding issues, problems, and opportunities; comparing data from different sources to draw conclusions; using effective approaches for choosing a course of action or developing appropriate solutions; taking action that is consistent with available facts, constraints, and probable consequences.

**8. Planning and Organising**

Establishing courses of action to ensure that work is completed efficiently.

**9. Valuing Diversity**

Appreciating and leveraging the capabilities, insights, and ideas of all individuals; working effectively with individuals of diverse style, ability, and motivation.

**10. Impact**

Creating a good first impression; commanding attention and respect; showing an air of confidence.