



## **Job Description**

### **Bequest Officer**

#### **cbm New Zealand**

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**Reports to:** **Supporter Engagement Administrator**

**Role:** Permanent Employment Contract

**Direct reports:** Nil

**Functional Relationships:** **cbm** staff, supporters, suppliers

**Location:** **cbm** office: 112B Bush Rd, Auckland, with flexibility to work from home

**Hours:** 25 - 30 hours per week.

#### **Organisational Vision & Values**

**Vision:** **An inclusive world in which all people with disabilities enjoy their human rights and achieve their full potential**

**Mission:** **Fighting to end the cycle of poverty and disability**

**Values:**

- We Champion Inclusion**
- We Strive for Justice**
- We Pursue Excellence**
- We Embrace Partnership**
- We Live with Integrity**

## Organisational Profile

**cbm is an international Christian-based development organisation with a key focus on supporting children and adults with disabilities in the world's poorest places.**

**cbm** works alongside people with disabilities in the world's poorest places to fight poverty and exclusion and transform lives. Drawing on over 100 years' experience and driven by Christian values, we work with the most marginalised in society to break the cycle of poverty and disability, treat and prevent conditions that lead to disability and build inclusive communities where everyone can enjoy their human rights and achieve their full potential. We work in 17 countries, investing in long-term, authentic partnership with the Disability Movement and maximising our impact through a coordinated mix of inclusive community-based programmes, local to global advocacy and delivering inclusion advice to other organisations.

### Purpose of the Role

The Bequest Officer is responsible for the continued development, implementation, and maintenance of **cbm's** Bequest Programme called the 'John 1:5 Society' in New Zealand. The Bequest Officer will co-ordinate bequest campaigning and bequest events (both online and in person), and provide excellent administrative support to **cbm's** bequest programme. The goal is to deepen engagement with targeted supporters so they leave a gift in their Will to **cbm**, and in doing so maximise bequest revenue year on year.

Key areas of Responsibility	Key Tasks	Performance Indicators
Bequest Programme	<ul style="list-style-type: none"> <li>• Promote <b>cbm's</b> bequests programme to long-term supporters by sending targeted bequest 'ask' letters, ensuring correct segmentation from database.</li> <li>• Be the main point of contact for <b>cbm</b> supporters who are either confirmed, interested in, or are in the process of leaving a bequest to <b>cbm</b>.</li> <li>• Follow up in a timely manner, all bequest enquiries, and bequest survey leads, through phone calls and sending relevant collateral.</li> <li>• Once a supporter is interested in leaving a gift in their will, be responsible for nurturing them on their bequest journey to having them confirm a gift in their will to <b>cbm</b>.</li> </ul>	<ul style="list-style-type: none"> <li>• Supporter feedback and review of monitoring reports showing increase to the number of confirmed bequestors and bequestor prospects, increased gifts in wills. Implement living wills programme.</li> <li>• Ensure all bequest leads and enquires are handled in a timely and accurate manner</li> <li>• Provide correct and relevant information and assist donor with any queries in a professional and friendly manner.</li> </ul>

	<ul style="list-style-type: none"> <li>• Maintain and develop excellent relationships with all known confirmed bequestors i.e. using developing and using <b>cbm</b> bequest collateral, and making touchpoints for event invitation, visits, and phone calls to further deepen engagement</li> <li>• Maintain accurate bequest records in <b>cbm's</b> CRM database.</li> <li>• Maintain the physical John 1:5 Society register, ensuring it is locked away for security reasons.</li> <li>• Support the establishment of growing "In Memoriam" programmes of gifts in lieu of floral tributes through a calling programme to funeral homes.</li> </ul>	<ul style="list-style-type: none"> <li>• Little or no complaints received.</li> <li>• Supporters spoken to courteously and requests carried out efficiently.</li> <li>• Supporter history correctly captured and kept up to date.</li> <li>• Number of touchpoints with supporters.</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Prepare monthly and quarterly monitoring report as agreed.</li> </ul>	<ul style="list-style-type: none"> <li>• In a timely and accurate manner</li> </ul>
Training	<ul style="list-style-type: none"> <li>• Attend relevant FINZ events, and participate in other online and in person courses, to keep up to date with bequest best practice and industry trends.</li> </ul>	<ul style="list-style-type: none"> <li>• Keeping up to date on best practice for bequests by attending relevant courses and events</li> <li>• Evidence of best practice applied.</li> </ul>
Administration support functions	<ul style="list-style-type: none"> <li>• As and when needed assist with some customer service and supporter engagement admin duties, i.e. answering the phone and email enquiries.</li> </ul>	<ul style="list-style-type: none"> <li>• Supporters spoken to courteously and requests carried out efficiently.</li> </ul>

### **Key Competencies Required – Qualifications, Experience, Skills, Knowledge, and Attitudes**

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| <ul style="list-style-type: none"> <li>• Possess a passion and genuine love for people and for serving others in keeping with <b>cbm's</b> Christian Kaupapa.</li> <li>• Fluent English with strong verbal and written communications skills.</li> <li>• Experienced in dealing with both inbound and outbound calling. A persuasive phone manner with excellent listening skills and the ability to build a rapport on the phone. Able to be kind, nurturing and considerate regardless of the type of call.</li> <li>• Excellent organisational skills and the ability to set priorities within own workload.</li> <li>• Self-motivated with the ability to achieve daily goals as well as show initiative, ownership and responsibility for own areas of work.</li> </ul> |
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- High degree of empathy with warm, friendly people skills and ability to stay calm when under pressure and when dealing with a variety of interactions.
- Fast and accurate keyboard skills with attention to detail with the ability to quality check own work.
- Experience using a CRM database.
- MS Office proficient including Word, Excel and Outlook.
- 3+ years' excellent bequest and/or supporter care and administrative experience in a similar role.
- Ability to holding information as confidential, when appropriate.
- Culturally sensitive.
- NCEA Level 3 (or equivalent).
- A highly positive and enthusiastic team player, willing to problem solve and help other team members if needed.
- Ability to work within a Christian framework and be sensitive to its various expressions across cultures and denominations.

### **OFFICE ACCOUNTABILITY**

Each employee must promote safe work practices and ensure a safe working environment is maintained at all times.

### **PERFORMANCE PLANNING AND REVIEW**

Performance planning and coaching is carried out at regular intervals and there will an annual appraisal.