

Legacy Giving Advisor

Supporting Presbyterian Support Central,
Family Works and Enliven



Presbyterian Support
Central

enliven



Role specification

Role Title

Legacy Giving Advisor

Business Unit

Business Services and Sustainability

Location

Central Hub

Reports to

General Manager Business Services and Sustainability

FTE

0.5 (20 hours per week)

Direct Reports

N/A

Purpose of the role

The Legacy Giving Advisor is responsible for supporting the development and growth of Presbyterian Support Central's (PSC's) Gifts in Wills (Legacy Giving) programme. This role will focus on reconnecting with both existing confirmed bequestors and new ones, strengthening donor relationships, improving the quality and integrity of donor information within our existing donor database, and developing a sustainable framework for future legacy donor acquisition and stewardship.

Working collaboratively across fundraising, administration, and marketing functions, the role will develop and implement stewardship and engagement initiatives, support brand awareness and lead generation activities, and help build a structured pipeline of current and future legacy supporters.

The role will play a key part in supporting PSC's long-term financial sustainability and mission impact, aligned with PSC's Strategic Plan to 2030.



Organisational overview

Presbyterian Support Central's (PSC) vision is of inclusive communities where people and families are safe, strong and connected. Our caring team is dedicated to providing person-centred, culturally responsive, caring and professional support to people from all walks of life. We are a not-for-profit organisation providing services in Taranaki, Whanganui, Horowhenua, Manawatu, Wairarapa and the greater Wellington region. PSC is one of seven autonomous regional Presbyterian Support organisations. Collectively we are one of Aotearoa New Zealand's largest not-for-profit health and social service providers

PSC's services for tamariki and their whānau are provided by Family Works, while our services for older people are provided by Enliven. Our Family Works services support children, young people, families and communities who have experienced trauma, family violence, separation, poverty, stress and anxiety, to have a safer and brighter future. Our Enliven services create age-friendly communities where people are happy and thrive, regardless of their age or ability. Our homes and villages are places where older people have companionship, choice, variety, fun, meaningful activity and a sense of purpose.

PSC is a charity incorporated under the Charitable Trusts Act 1957. While we operate as a separate entity to the Presbyterian Church, our name is a celebration of our beginnings, our heritage and the values we share.



Key Accountabilities

Legacy Giving Stewardship & Engagement

- Reconnect and maintain engagement with confirmed bequest donors to strengthen relationships and reconfirm legacy intentions
- Ensure donors receive high-quality stewardship, engagement, and recognition aligned with PSC's values. Including quality resources etc. giving/bequest plan, annual reports, impact reports
- Build meaningful relationships with prospective and existing legacy supporters to strengthen long-term donor connection with PSC
- Develop and implement communication and stewardship plans for existing and future bequestors

Legacy Giving Growth & Donor Acquisition

- Develop a sustainable acquisition plan to grow PSC's Gifts in Wills programme
- Identify and engage high-potential prospective bequest donors within PSC's supporter and donor base
- Support the development and implementation of legacy giving campaigns, initiatives, and lead generation activities
- Contribute to building a structured pipeline of current and future legacy supporters aligned with PSC's long-term sustainability goals.

Collaboration and Communications

- Work collaboratively with fundraising, administration, and Marketing & Communications teams to support legacy giving initiatives
- Partner with Marketing & Communications to develop supporting collateral, donor communications, promotional material, and brand awareness activities
- Support initiatives that increase awareness and understanding of Gifts in Wills across PSC's supporter community

Database Management & Reporting

- Maintain accurate and up-to-date donor records, engagement activity, and relationship notes within Fundraiser One
- Ensure the quality and integrity of donor and bequest information is maintained
- Assist with reporting, tracking, and analysis of legacy giving activity, donor engagement, and programme outcomes
- Support the development of sustainable processes and systems for ongoing management of PSC's Legacy Giving programme



Core Competencies



Customer Service

- Strives to provide excellent customer service across the business. Is visible, accessible and approachable to management and staff – meets with people across the business and in different locations
- Actively seeks input from clients and key stakeholders to identify their unique business needs, goals, opportunities and risks
- Is responsive to client requests and queries, attends promptly to any concerns and resolves these where at all possible
- Aware of what sites and clients are saying - listens to and understands their needs
- Ensures that client expectations are managed, and delivery capability clearly communicated.



Communication

- Practises active and attentive listening
- Explains information and gives instructions in clear and simple terms
- Willingly answers questions and concerns raised by others
- Responds in a non-defensive way when asked about errors or oversights, or when own position is challenged
- Is confident and appropriately assertive in dealing with others
- Deals effectively with conflict.



Relationship Management

- Actively attempts to identify client's unique business needs, goals, opportunities and risks
- Actively seeks input from clients and key stakeholders to ascertain needs
- Demonstrates thoughtfulness, courtesy, openness and respect for the organisation's clients and employees. Gains trust and confidence
- Establishes and sustains positive working relationships with people at all levels. This includes the development of networks, promoting the organisation's brand and purpose and seeking new ideas
- Fosters an open, collective, mutually beneficial and co-operative culture within the wider organisation
- Ensures that client expectations are managed and delivery capability clearly communicated
- Attends promptly any client concerns and resolves these where at all possible.





Taking Responsibility

- Plans and organises work, allocating time to priority issues, meeting deadlines and coping with the unexpected
- Adjusts work style and approach to fit in with requirements
- Perseveres with tasks and achieves objectives despite obstacles
- Is flexible in thinking and open to changes affecting role and condition
- Is reliable - does what one says one will
- Consistently performs tasks correctly - following PSC, Family Works and Enliven policy and procedures and protocols.



Teamwork

- Develops constructive professional working relationships
- Has an open positive manner
- Is visible, accessible and approachable to management and staff – meets people across the business in different locations
- Works cooperatively - willingly sharing knowledge and expertise with colleagues
- Shows flexibility - is willing to change work arrangements or take on extra tasks in the short term to help the service or team meet its commitments
- Supports in word and action, decisions that have been made by the organisation
- Understands the impact of own role, and how that directly or indirectly supports the work of wider team and organisation.



Quality and Innovation

- Sets high standards for self
- Constantly looks for innovative ways to achieve greater levels of efficiency, cost-effectiveness and growth
- Provides quality service to those who rely on one's work
- Looks for ways to improve work processes - suggests new ideas and approaches
- Explores and trials ideas and suggestions for improvement made by others
- Shows commitment to continuous learning and performance development.



Qualifications

Formal qualifications in fundraising, communications, marketing, business development, or a related field are advantageous but not essential.

Experience

- Experience in relationship management, donor engagement, fundraising, customer service, community engagement, stakeholder engagement, or a similar people-focused role.
- Demonstrated ability to build trust and develop meaningful relationships with a wide range of people.
- Strong interpersonal, written, and verbal communication skills.
- Experience using CRM or donor management systems.
- Ability to work independently and manage priorities effectively.
- Knowledge of philanthropic fundraising, legacy giving, supporter stewardship, or donor engagement practices is desirable but not essential.
- High level of organisation and attention to detail.

Personal Attributes

- Passion for the mission, values, and work of Presbyterian Support Central.
- A natural people person with strong relationship-building skills and the ability to create genuine, lasting connections.
- Warm, empathetic, and confident communicator who is comfortable engaging with people from diverse backgrounds and life experiences.
- Ability to listen actively and build trust through authentic and meaningful conversations.
- Comfortable discussing philanthropy, charitable giving, and the lasting impact supporters can have through legacy giving.
- Supporter-centered in approach, with a commitment to delivering an exceptional supporter experience.
- Self-motivated, proactive, and able to work independently while maintaining momentum and focus.
- Professional, discreet, and respectful when engaging with supporters and their families on sensitive or personal matters.

Other

- Ability and willingness to travel throughout the PS Central region (Taranaki to Wellington) as required.
- A current full New Zealand driver's license



Treaty of Waitangi

Presbyterian Support Central is committed to working in a multi-cultural way and affirms the place of Māori as Tangata Whenua and seeks to actively promote the spirit of equality and partnership inherent in the Treaty of Waitangi.

The role description will be reviewed regularly in order for it to continue to reflect the changing needs of the organisation. Any changes will be discussed with the position holder before being made. Annual objectives and performance measures will be set each year during the annual performance planning and development meeting.

I have read this job description and accept it.

Signed: Date:

Employee's Name: Date:

Office use only

Prepared by: (Name and Position) Date:

Approved by: (Name and Position) Date:

