



Supporting women.  
Defeating poverty.

## **Gifts in Wills and Mid Value Manager**

### **Position Description**

<b>Title:</b>	Gifts in Wills and Mid Value Manager
<b>Classification:</b>	CARE Band 5
<b>Department:</b>	Fundraising and Marketing
<b>Location:</b>	Melbourne
<b>Position reports to:</b>	Head of Donor Relations
<b>Position Type:</b>	Permanent, Full time

CARE Australia is looking for a Gifts in Wills and Mid Value Manager to join the Fundraising and Marketing team!

- Work with a team dedicated to supporting women around the globe to save lives, defeat poverty and achieve social justice
- Flexible working environment, based in Melbourne or Canberra
- Permanent, Full Time position

CARE Australia supports women around the globe to save lives, defeat poverty and achieve social justice. We work in partnership with local communities to provide equal opportunities for women that they have long been denied: the ability to earn an income, gain access to their fair share of resources, to lead and participate in decisions that affect their lives, and to be able to withstand the increasing impacts of climate disasters and other crises.

CARE Australia is a member of the CARE International confederation. We strive for a world of hope, tolerance and social justice, where poverty has been overcome and people live in dignity and security.

### **About CARE Australia**

CARE Australia supports women around the globe to save lives, defeat poverty and achieve social justice. We work in partnership with local communities to provide equal opportunities for women that they have long been denied: the ability to earn an income, gain access to their fair share of resources, to lead and participate in decisions that affect their lives, and to be able to withstand the increasing impacts of climate disasters and other crises.

CARE Australia is a member of the CARE International confederation. We strive for a world of hope, tolerance and social justice, where poverty has been overcome and people live in dignity and security.

## **About the Department**

CARE Australia's Fundraising & Marketing (F&M) Department is collectively responsible for ensuring the organisation maintains a visible, engaging presence in the community, and our profile is leveraged to garner financial and other support from the Australian public.

## **About the Role**

Gifts in Wills is a strategic priority for CARE Australia, so this role will play a key role in contributing to the future growth and success of this crucial program. They will be responsible for the acquisition, retention and relationship management of CARE Australia's Gifts in Wills program, including a cross-channel approach to promoting the importance of leaving a gift to CARE and prospecting/acquiring new confirmed bequestors, as well as relationship management of current bequestors and as aspects of estate management (in consultation with Head of Donor Relations and Director of Fundraising & Marketing).

They also oversee our 'mid-value' donor program across various channels including direct mail, digital, telephone and one-to-one meetings - helping grow our pool of mid-value supporters while offering existing mid-value donors opportunities for additional engagement to foster positive relationships and maximise retention.

The GIW & MV Manager will work closely with the Senior Manager of Individual Giving to ensure appropriate stewardship of Middle Value and Gift in Wills donors in direct marketing cash appeals or donor care activities, as well as carrying responsibility for developing and executing a supporter journey for donors in their portfolio.

They will also collaborate with the Key Relationships & Philanthropy Team to identify opportunities for upgrading mid value donors into the Major donor portfolio and work closely with the digital fundraising and marketing teams to develop marketing strategies for GIW acquisition.

The role holds accountability for the achievement of financial and non-financial performance targets related to our annual appeals program and will oversee the development of an annual strategy and budget relating to their program. Budget management and reporting against KPIs will be included in their responsibilities.

## **Key Responsibilities**

### Gifts in Wills Responsibilities

- Develop and manage the implementation of innovative, multi-channel stewardship strategies for the acquisition, retention and growth of Gifts in Wills supporters.
- Manage and build on CARE's current Gift In Wills product offering.
- In collaboration with the Head of Donor Relations, develop and manage the annual plan, budget reporting and analysis for the mid-level program.
- Manage administration of legacy work including liaison with lawyers/administrators of estates, coordination of authority forms and representation of CARE in meetings

with lawyers and other charities when an estate has been contested. Seek legal advice when estates are contested

- Initiate and maintain contact with Bequestors and Prospects through personal visits, letters, phone calls, cards, and special events.
- Collaborate with the Product Development & Marketing team to develop marketing plans and promotions for GIW.
- Utilise data-driven insights, commitment scoring and supporter surveys to determine Gifts in Wills priorities and to ensure approaches are stakeholder-centric.

### Mid Value Donor Responsibilities

- Develop and manage the implementation of CARE's mid-level donor program (individuals in the \$1,000–\$4,999 giving range) - including strategies that acknowledge the appreciation, recognition and engagement of our mid-level supporters.
- In collaboration with the Head of Donor Relations, manage and build on CARE's current mid-value product offering.
- In collaboration with the Senior Manager of Individual Giving, develop and manage the annual plan, budget reporting and analysis for the mid-level program.
- Collaborate with relevant internal teams on creative design, messaging and data segmentation for mid-level prospect communications.
- Conduct continuous analysis of the mid-level giving program, recommending changes to design and strategy on an ongoing basis.
- Build relationships with mid-level supporters via phone calls, personalised email communications, ongoing written contact, events and occasional face to face meetings - including the tracking of all correspondence with mid-level supporters in CRM.

### **Selection Criteria**

- At 3-5 years experience in bequest programs, including estates management is crucial.
- Experience managing or coordinating a mid-level program strongly preferred.
- Demonstrated ability to develop successful strategies for supporter recruitment and retention.
- Demonstrated ability to produce program and project documentation, such as strategy documents, creative briefs, data briefs, project plans, wrap-up reports, KPI reports.
- Familiarity with complex data segmentation for large fundraising programs
- Strong written and oral communication skills.
- Ability to deal calmly with pressure and deadlines and to communicate with diplomacy in all scenarios.
- Collaborative team player able to work effectively in cross-functional teams
- Ability to analyse and organise information to identify philanthropic patterns, tendencies, and relationships among supporters.

**What we can offer you:**

- A flexible and supportive working environment
- Generous salary packaging benefits
- 17.5% leave loading
- Professional development and training opportunities

CARE Australia will seek information from job applicants' previous employers about incidents of sexual exploitation, sexual abuse and/or sexual harassment, and/or child abuse the applicant may have been found guilty to have committed or about which an investigation was in the process of being carried out at the time of the termination of the applicant's employment with that employer.

By submitting the application, the job applicant confirms that s/he has no objection to CARE Australia requesting the information specified above.

CARE Australia is proud to be an equal opportunity employer. We value diversity and encourage applications from people living with a disability and/or have lived experience of disability. We also encourage Aboriginal and Torres Strait Islander people, and those from culturally and linguistically diverse backgrounds to apply.

**How to Apply?**

Please review the Candidate Information Pack available on our website and complete the online application form by clicking 'Apply Now' via the portal on our website. Please ensure you attach your CV and cover letter addressing the selection criteria (max 2 pages). After submitting your application you will receive an automatic confirmation of receipt. Only applicants who fully address the criteria will be considered.

This will be conducted as a rolling recruitment process, with shortlisting and interviews being completed as applications are received. Please submit your application ASAP if you are interested in the role. More information can be found [here](#).

**Questions about the role?**

Please contact Alice Anwar on [alice.anwar@care.org.au](mailto:alice.anwar@care.org.au) using the subject line "Gifts in Wills and Mid Value Manager Enquiry". Please do not email applications to this address.

Applications Close: 11:59 pm (AEDT) Wednesday 7th November 2022.