

**Position Description**  
**Position title: Bequests Manager**

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| **Mission Australia** | |
| About us: | Mission Australia is a non-denominational Christian organisation that has been helping people re gain their independence for over 155 years.  We’ve learnt the paths to getting back independence are different for everyone. This informs how we help people, through early learning and youth services, family support and homelessness initiatives, employment and skills development, and affordable housing. Our nationwide team delivers different approaches, alongside our partners and everyday Australians who provide generous support.  Together we stand with Australians in need, until they can stand for themselves. |
| Purpose: | Inspired by Jesus Christ, Mission Australia exists to meet human need and to spread the knowledge of the love of God.  *“Dear children, let us not love with words or speech but with actions and in truth.” (1 John 3:18)* |
| Values: | Compassion Integrity Respect Perseverance Celebration |
| Goal: | To reduce homelessness and strengthen communities. |
| **Position Details:**  Position Title: Bequests Manager | |
| Division: | Fundraising and Marketing |
| Reports to: | Senior Manager, Premium Supporters |
| Position Purpose: | The purpose of the Bequests Manager is to lead the Bequests Team in the development and management of the Bequest Program, which consists of relationship management, acquisition and retention campaigns, events and other activities for bequest supporters.  The key accountability for this role is to increase the number of supporters committed to leaving a bequest to Mission Australia in their Will and to build the pipeline for sustainable future income.  The Bequests Manager role is a full time, permanent position. |
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**Position Requirements (What are the key activities for the role?)**

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| |  |  | | --- | --- | | **Key Result Area 1** | ***Team supervision/management*** | | **Key tasks** | **Position holder is successful when** | | * Day-to-day management of the Bequests Team consisting of bequest estates and relationships coordinators * Conduct/attend premium supporter staff meetings, staff development days and other meetings or functions * Organise and lead Bequest team and sales meetings, trainings and functions * Participate fully in the performance management process, working with staff to develop, monitor and review work performance * Consistently track and take responsibility for reaching team- and individual key performance indicators (KPIs), develop and share best practice ideas, and assist and support other team members to reach their individual and team goals. | * Team is well developed and performing according to agreed KPIs | | **Key Result Area 2** | ***Marketing and supporter engagement*** | | **Key tasks** | **Position holder is successful when** | | * Develop and maintain the Bequest Fundraising strategy, including marketing annual activity, campaign and events calendar and budget in collaboration with the Senior Manager, Premium Supporters and with support from the Bequest Coordinator, Estates and in collaboration with Events Manager * Manage direct marketing campaigns and activities including surveys, direct mail, telemarketing and digital from brief through to review * Identify and implement new engagement opportunities * Participate in supporter journey implementation | * Strategy is developed and implemented * Direct Marketing campaigns are executed on time and within budget to agreed KPIs * Supporter journey is implemented and new engagement opportunities identified and implemented | | **Key Result Area 3** | ***Relationship Management*** | | **Key tasks** | **Position holder is successful when** | | * Nurture, maintain and enhance relationships with existing bequest supporters in the pipeline through phone calls, mailings, visits, events and personalised messages * Build and maintain relationships with external suppliers for campaigns and events | * Relationships with donors are maintained and tracked in CRM * New and currently supplier relationships maintained | | **Key Result Area 4** | ***Reporting and analytics*** | | **Key tasks** | **Position holder is successful when** | | * Develop and maintain analytics and reporting for marketing campaigns * Monitor activity reports for bequest team members * Monitor estate income forecasting reports * Create bespoke analytics reports with support from the analytics team * Identify opportunities for process improvement | * Analytics and reports are developed and monitored * Processes are improved where opportunities arise | | |
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**Recruitment information**

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| **Qualification, knowledge, skills and experience required to do the role** |
| * Strong team leader/team management skills of small to medium sized teams * Min 5 years’ experience in a team leader or team manager role in a fundraising or marketing environment, preferably in Bequests * Proven ability to build strong, respectful and robust relationships, with a strong track record of achieving targets within set timeframes and with limited resources * Experience in executing marketing campaigns including mail, telemarketing, digital and events * Understands the competitive fundraising environment * Accountable, with good financial acumen, analytical and interpretive skills * A team player with strong work ethic, a positive attitude, a high degree of professionalism, discretion and confidentiality * Strong presentation skills and level of comfort speaking to large audiences * Well-presented with impeccable attention to detail and timing/timelines * Excellent interpersonal skills, outstanding presentation and negotiation skills * Well-developed written and verbal communication skills, good command of Microsoft Office |
| **Key challenges of the role** |
| * Managing a small focused team including team members who work in different locations * Growing the bequest pipeline to ensure our financial stability in years to come * Close cooperation with the Mass Fundraising and Major Donor teams to effectively source leads |

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| **P**  **U Purpose and Values** |
| * Actively support Mission Australia’s purpose and values; * Positively and constructively represent our organisation to external contacts at all opportunities; * Behave in a way that contributes to a workplace that is free of discrimination, harassment and bullying behaviour at all times; * Operate in line with Mission Australia policies and practices (EG: financial, HR, etc.); * To help ensure the health, safety and welfare of self and others working in the business; * Follow reasonable directions given by the company in relation to Work Health and Safety. * Follow procedures to assist Mission Australia in reducing illness and injury including early reporting of incidents/illness and injuries * Promote and work within Mission Australia's client service delivery principles, ethics, policies and practice standards * Actively support Mission Australia’s Reconciliation Action Plan * Ensure all fundraising materials and practices comply with relevant national and state fundraising legislation |

**Work Health and Safety**

Everyone is responsible for safety and must maintain:

* A safe working environment for themselves and others in the workplace
* Ensure required workplace health and safety actions are completed as required
* Participate in learning and development programs about workplace health and safety
* Follow procedures to assist Mission Australia in reducing illness and injury including early reporting of incidents/illness and injuries

**Compliance checks required**

**Working with Children**

**National Police Check**

**Vulnerable People Check**

**Drivers Licence**

**Other (prescribe)**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Approval**

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| **Manager name** |  | **Approval date** |  |

Elvira Lodewick Jan 2019