

Gifts in Wills Manager

Job Description

JOB TITLE:	Gifts in Wills Manager
REPORTING TO:	Head of Individual Giving
SALARY: inclusive of super	
HOURS: fulltime, part time, based on 38 hour week	Part time – 4 or 5 days a week
LOCATION:	Sydney CBD – Barrack St

Purpose of the position

The Gifts in Wills Manager plays a key role in contributing towards the National Breast Cancer Foundation's exciting and ambitious fundraising program in the coming years.

Reporting to the Head of Individual Giving this role is responsible for the delivery of the organisation's Bequest strategy and growth plans.

This key role primary objective is to ensure that Bequest fundraising is promoted effectively to the Australian public, leads are cultivated and supporters are retained over time.

Working in close collaboration with the Individual Giving Team members and across the rest of the organisation, the Gift in Wills Manager is responsible for end to end implementation of the bequest plans and processes, from bequest communications to personalised stewardship of current and potential bequestors through to estate administration.

The role will require a relationship focused fundraiser comfortable working within KPI framework, operating with a strategic approach to ensure the development of the Bequest portfolio.

To be successful in the role you will have at least 3+ years of experience in a bequest role, you demonstrate project management skills, including a proven ability to develop budgets, innovative marketing approaches and outstanding communication skills (written and verbal).

Key responsibilities and duties

Strategy and Planning

- Develop, manage and implement, the Bequest strategy and budget in consultation with Head of Individual Giving
- Work with internal stakeholders across the organisation to collaborate across the portfolio to maximise lead generation activities, conversion strategies and donor retention.
- Ensure all Bequest activities are conducted in line with legislation compliance.

Relationship Management

- Implement and maintain supporter engagement and movement within the bequest prospects including daily phone calls, organising and running events such as lab tours, morning teas, visits.
- Ensure appropriate and timely follow-up of bequest donors following the receipt of financial commitments.
- Liaise with solicitors and other third parties to ensure the effective and timely administration of estates, and the keeping of accurate documentation regarding wills and estates and reporting regularly on their status.
- Identify and research bequest prospects to reach out with acquisition campaigns or convert from existing donors.

Campaign Development – Acquisition and Retention

- Scope and assess innovative approaches to enhance bequest pipeline.
- Maintain and enhance NBCF's confirmed bequestor group 'Research Guardians' through dedicated events and communications.
- Ensure all data is up-to-date to allow efficient reporting and profitable move management.
- Ensure all donors are well supported and acknowledged throughout their relationship with NBCF.
- Develop, implement and optimise successful direct marketing campaigns across various channels which include mail, phone and digital to ensure bequest pipeline sustainability.

Budget and Reporting

- Deliver reports to document strategy implementation and performance.
- Regularly track and report on campaign results identifying key insights.
- Secure detailed move management reporting to highlight pipeline sustainability.

Qualifications, Work Experience and Skills

- At least 3 years' experience in a bequest marketing role
- Ability to develop and maintain relationships with individual supporters, their families and other members of the public over time
- Ability and interest to learn about breast cancer research and clearly communicate research to our supporters
- Experience in liaising with professional third parties such as solicitors
- Ability to develop relationships with multiple stakeholders
- Demonstrated project management skills, including a proven ability to develop budgets and work with constraints to achieve financial targets
- High level word processing skills including an excellent knowledge of MS office and experience with fundraising/relationship management databases.
- Proficient in Microsoft Office applications
- Proficient working with donor management software, (preferably Raiser's Edge)
- Ability to manage multiple projects and balance sometimes competing and conflicting priorities
- Current Drivers Licence

Please note, Volunteering is one of our values. All NBCF employees are expected to participate in key events. This will take the form of volunteering at TriPink, Mother's Day Classic, City to Surf etc.