



Bequests and Mid Value Manager Fundraising and Marketing

Close Date: 11:59PM (AEST)
Sunday 1 August 2021



Supporting women.
Defeating poverty.

Position Description

Title:	Bequests and Mid Value Manager
Classification:	CARE Band 5
Department:	Fundraising & Marketing
Location:	Melbourne
Position reports to:	Head of Donor Relations
Position Type:	Permanent, Full time

About CARE Australia

CARE is an international humanitarian aid organisation fighting global poverty, with a special focus on working with women and girls to bring lasting change to their communities. As a non-religious and non-political organisation, CARE works with communities to help overcome poverty by supporting development projects and providing emergency relief. We know that supporting women and girls is one of the most effective ways to create sustainable outcomes in poor communities. We depend on support from the Australian public to carry out our work.

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.

For over 30 years, CARE Australia has earned an international reputation for our ability to respond quickly to emergency situations in countries as diverse as Haiti, Pakistan and East Africa. We are also renowned for our innovative, sustainable and effective long-term development projects. All our projects are designed to equip the people we support with skills and resources so they can take charge of their lives and work towards a better future.

CARE Australia (CA) is directly responsible for program design, implementation, monitoring and evaluation, as well as management and contractual control of all projects. As a consequence, we have a high degree of accountability and transparency. CARE Australia is committed to protecting the rights of children in all areas we work around the world.

About the Department

The Donor Relations team is responsible for delivering growth in revenue received from the Australian public in support of CARE's work. This is achieved through effective high volume direct marketing approaches, and through exceptional relationship management and nurturing of high value supporters including Bequestors, Major Donors and Trustees of Foundations. The team holds responsibility for both recruiting new supporters and for

developing relationships with supporters that maximize their support to CARE, predominantly through the generation of cash donations, regular gifts, events, gift catalogue purchases and legacy pledges.

About the Role

The Bequests and Mid Value Manager is responsible for the acquisition, retention and relationship management of CARE Australia's 'mid-value' donors across various channels including direct mail, digital, telephone and one-to-one meetings.

They are also responsible for the management of our 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 will work closely with the Cash Giving Manager 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 Philanthropy Manager 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

- Develop, implement and manage CARE's mid-level donor program (individuals in the \$500–\$5,000 giving range), including establishing short-term and long-term strategies
- Develop and oversee the implementation of innovative, multi-channel stewardship strategies for the acquisition, retention and growth of mid-level supporters
- Conduct continuous analysis of the mid-level giving program, recommending changes to design and strategy on an ongoing basis
- Utilise data-driven insights, commitment scoring and supporter surveys to determine priorities and to ensure approaches are stakeholder-centric
- Collaborate with relevant internal teams on creative design, messaging and data segmentation for mid-level prospect communications
- Build relationships with mid-level supporters via phone calls, personalised email communications, ongoing written contact, events and occasional face to face meetings
- Track all correspondence with mid-level supporters in CRM, maintaining a high level of attention to detail
- Develop one to many outreach plans that demonstrate appreciation, recognition and engagement of mid-level supporters

- Develop and manages the annual plan, budget reporting and analysis for the mid-level program Build internal understanding and awareness of mid-level supporter fundraising through training, collaboration and education
- Manage and build on CARE's current Gift In Wills Program including development of required collateral
- Work with the Donor Relations team to analyze CARE's donor program and help develop strategies for renewing, and upgrading donors
- Develop shared KPIs for prospect and pipeline development
- Collaborate with the Product Development & Marketing team to develop marketing plans and promotions for GIW
- Organize donor cultivation events in coordination with the KR team
- 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. (Stewardship Program)

Selection Criteria

- 3-5 years in an individual giving or mid-level program capacity
- 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
- Demonstrated understanding of bequest programs, Estates and Wills

Approved by
 Director of FDC
 22 June 2020

CARE Australia Terms and Conditions for Australian-based staff

Title:	Bequests and Mid Value Manager
Department:	Fundraising & Marketing
Location:	Melbourne
Salary Range:	CARE Band 5 (\$87,350 - \$95,270)
\$87,350	Base Salary (includes a Fringe Benefits component of \$15,900)
\$ 8,735	10% Superannuation
\$96,085	Total Package

Salary packaging

We offer salary packaging options to all Australian-based employees.

Salary packaging can reduce your income tax by allowing you to pay for certain expenses with pre-tax dollars. You have the option to salary package your mortgage, rent, rates, loans, school fees, and more.

This packaging arrangement means the base salary has a higher overall commercial value. To understand how this could impact on you, you may wish to seek independent financial advice. Full details will be given to short-listed candidates if requested.

Employment details: This full-time, permanent job is subject to three months' probation. All entitlements are set out in the CA Contract of Employment. Full employment conditions are set out in the CA Human Resource Policy Manual.

Working Hours: All full-time employees work 37.5 hours per week. Each full-time employee is expected to work 7.5 hours during the course of a working day.

Please Note: CA's salary structure is based on eight Bands and five salary points within each band. It is usual for people commencing with CA to be placed on Point One of the relevant band with further progression through the bands related to the ongoing performance appraisal process. The Salary Package listed in this document is Point One for the relevant salary band.

Additional information and how to apply

To apply:

To apply for a job with CARE Australia, please review the Candidate Information Pack and complete the online application form linked to the relevant vacancy on our careers page (<https://careaustralia.connxcareers.com>).

Please ensure you attach your CV and cover letter at the bottom of our application form before clicking 'Apply Now'. Once you have submitted your application you will receive an automatic confirmation of receipt.

Applications close: 11:59 pm Australian Eastern Standard Time, Sunday 1 August 2021.

Before submitting your application, please ensure you can answer 'yes' to the following:

1. Have you thoroughly reviewed the candidate information pack, including the terms and conditions for the role?
2. Have you completed the online application form?
3. Have you uploaded your cover letter and CV, including your response to the selection criteria?
4. Is your application succinct and informative?

Questions about the role?

Please contact Alice Anwar on 0468 684 329 or alice.anwar@care.org.au (please do **not** email applications to this address).

Right to work in Australia for international applicants

CA is not in a position to sponsor Australian working visas. In applying for an Australian-based position you will be expected to already have a valid Australian work permit (permanent residency or applicable work visa). Information on Australian visas and working entitlements are available from the Australian Government Department of Home Affairs.

Child Protection and Protection from Sexual Harassment, Exploitation and Abuse

We are committed to each other and to the protection of the people we serve. We do not tolerate sexual misconduct within or external to our organisation, and we embed child protection in all we do. Child protection and protection from sexual harassment, exploitation and abuse, are fundamental to our relationships, including employment, and our recruitment practices are designed to ensure we only recruit people who are suitable to work with other staff and the people we serve. As well as pre-employment checks including police checks and background checks, we will use the recruitment and reference process to ensure potential new staff understand and are aligned with these expectations.

CA will seek information from a job applicant's previous employer about the applicant's suitability for the role. Any allegations relating to sexual exploitation, sexual abuse and/or sexual harassment and/or child abuse, which may or may not have been proven against the applicant, will be relevant information.

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

To find out more, please contact the Manager - Human Resources.

Gender, diversity and inclusion

CA respects and values diversity, and does not discriminate on the basis of race, gender, ethnicity, age, disability, religion or politics. We are committed to embedding gender equality, diversity and inclusion throughout our organisational practices and in the programs we deliver. This commitment is reflected in all of our processes and policies, including recruitment and selection.

Our selection decisions embody transparency and fairness from the outset of a recruitment process through to the selection decision. This is demonstrated through advertising roles as broadly as possible and basing the selection of the successful applicant on merit. We endeavour to mitigate any potential bias in our selection committee shortlisting processes by ensuring all selection committees are gender balanced and independent.

To ensure all candidates can compete on an equal basis in the application and interview process, CARE will provide reasonable accommodations for assistance where requested. If you have any requirements that need to be considered as part of your application process, please do not hesitate to let us know.

The recruitment process and expected timeframes

CA appreciates the time and effort taken to apply for a position with us. We are committed to ensuring all recruitment processes are fair, efficient and transparent and we are committed to equal opportunity and diversity in the workplace. Below is some information on how our recruitment processes generally work and expected timeframes:

- All vacant positions are advertised on our website;
- Unless otherwise stated, roles are advertised for a minimum of 2 weeks;
- We aim to complete the short-listing process within 2-4 weeks following the close date of applications;
- Selection committee interviews are held for a select number of candidates either face-to-face or via the telephone, ideally within a month following the application close date;
- Additional background checks may be required prior to the interview such as Right to Work and Working Visas;
- Referee checking of the preferred candidates happens in the week following interviews. Referees will not be contacted without prior permission; and
- An Offer of Employment will ideally be made within a week of interviews.

Tips on how to prepare your application

Your application is the first step towards a rewarding career with CA and our first impression of you. Therefore, it is important that you give yourself the strongest opportunity to succeed right from the beginning.

To improve your chances of selection we recommended that you:

- Thoroughly research CA, including our organisational goals, values, mission and vision;
- Carefully read the Position Description and ensure you understand the role you are applying for and that it is suited to your skills, experience and qualifications;
- Carefully read the Terms and Conditions and check whether you are eligible to apply, and that the salary and entitlements match your expectations; and
- If you wish to discuss the position, the selection process and the work environment, please phone the contact officer outlined in the candidate information pack.

To ensure an informed assessment of your suitability and claims for the position is conducted it is recommended that you complete all parts in the application process.

Tips on how to prepare a CV

Your CV is one of the most useful tools in demonstrating your suitability for a role. When preparing your CV it is important to remember the following:

- Keep it simple and succinct, we recommend approximately 2-4 pages;
- List your relevant work experience in chronological order, starting from your current or most recent role;
- Do not just outline each position and employer, be sure to include your responsibilities and achievements in each position;
- Ensure relevant personal information is provided such as your name, contact number, address and email address as well as any period where you might be uncontactable;
- List your qualifications and the institute from which you received them;
- List at least 2 professional referees, their current role, contact details and their relationship with you. Friends and associates are not suitable as referees;
- Explain any gaps in your career (travel, having a family etc);
- Outline any relevant volunteering experience;
- Do not use abbreviations, slang or jargon; and
- There is no need to insert pictures or graphics, or attach any certificates or referee reports.

Why work for us?

CA is one of Australia's largest international aid and development agencies. By working for CA, you will make a direct contribution to the ongoing fight to address global poverty. As an organisation that pursues best practice in the work we do, we seek to support our staff through offering a comprehensive package of salary and benefits to complement and enhance your work with us.

Here is a brief list of some of the benefits available to CA staff. Note that outside of Australia, some benefits may vary from country to country to take into account local needs and differences.

Workplace diversity and flexibility

As part of our commitment to Gender Equity and Diversity, we recognise that our staff may need the flexibility to manage their life outside of the office. At CA, we have a range of creative solutions that may be negotiated where possible, on a case-by-case basis, to help you balance work with life. Examples include alternative or reduced hours or job-sharing arrangements.

Performance management

Our performance management framework helps you work closely with your manager to plan, manage, review and give feedback about your performance throughout the year, leading to a salary review based on your continuous improvement. Teamwork is part of our culture and we provide training to our staff and managers in communication and decision-making skills to ensure we remain engaged with the work we do.

Leave entitlements

CA employees have access to standard annual and personal leave and additional leave in recognition of long service. We have paid parental leave, and for eligible staff on overseas postings, we offer rest and rehabilitation leave and annual home leave in recognition of difficult working conditions.

Professional development

Our employees are amongst the best in their fields, and if an opportunity exists to help you continue to build your professional skills and prepare for future aspirations, our Professional Development opportunities will help you do just that. Ongoing staff who have been with us for longer than 12 months have the chance to apply for our Study Support scheme – helping you with reimbursements towards gaining a formal tertiary qualification.

Employee Assistance Program

Our company-paid Employee Assistance Program provides support to our staff and their immediate family members through a free counselling service where any work or personal issues can be discussed confidentially.

Please note, this represents just a small selection of the benefits available to CA staff and does not constitute a legally binding document. Entitlements and other development opportunities are often subject to a qualifying period.

Privacy Policy

Your privacy is important to CA. Please read this carefully as it describes how we handle your personal information.

CA is committed to protecting and securing the privacy and confidentiality of your personal information. If at any point you want to know more about our policy, or are worried about your own details, or have ideas on how we can improve our practices, please let us know via jobs@care.org.au.

Importantly, CA is bound by the *Privacy Act 1998* (Cth) and the privacy provisions of other applicable legislation. In particular, CA must adhere to the *Australian Privacy Principles* in relation to collecting, holding, using, disclosing, securing and allowing access to your personal information.

We may revise this privacy policy from time to time by publishing a revised version on our website. That revised version takes effect from the time it is published.

Collection of personal information

CA collects and uses personal information about you in relation to your application for employment or volunteer/intern engagements with CA.

Your information is collected from you at the time you complete your application for employment or volunteer/intern engagement through our recruitment system. From time to time we may obtain personal information from third parties such as referee reports. When we do so, we will take reasonable steps to ensure that we make you aware of the collection of your information in accordance with Australian privacy law.

'Personal information' simply put is any information or opinion that can identify or be used to identify you.

During our recruitment process, CA may conduct some or all of the following pre-employment screening checks:

- Confirmation of qualification/education levels;
- Confirmation of previous employment;
- Criminal history/background checks;
- Health check; and
- Reference checks.

Why does CA collect this information?

- To determine your suitability for employment or volunteer/intern engagement.
- So we can complete all the necessary steps in preparing you for your employment or volunteer/intern engagement should you be successful.
- So we can contact you about your current application or future employment or volunteer/intern opportunity.

Disclosure of personal information

The information you provide us with will be disclosed to the CA HR Branch and selection committee members directly involved with the recruitment process.

How CA stores your personal information

Your information will be stored by our e-recruitment provider in the cloud on services located in Australia. We require this third party provider, through our agreements with them, to comply with our security guidelines and privacy laws.

Access to personal information outside Australia

We are an international organisation with internal information sharing between our country offices. This means that it is possible your personal information may be shared with our offices based outside Australia if selection committee members are based overseas.

Supporting women.
Defeating poverty.



care.org.au

