

POSITION DESCRIPTION

Bequests Manager



DEPARTMENT Australian Program Team

LOCATION TEAR’s National office,
Blackburn, VIC or

TEAR’s NSW office,
Surry Hills, NSW

REPORTS TO Head of Fundraising

DIRECT REPORTS None

TYPE Up to 3 days per week

LAST UPDATED August 2019

POSITION PURPOSE

TEAR Australia’s Bequests Manager has a vital role in building tailored relationships with TEAR’s Christian supporters. The Bequests Manager will provide opportunities for supporters to include a gift to TEAR in their Wills as a meaningful and impactful way to respond to global poverty and injustice.

Specifically, the role will implement a newly-created strategy to grow income from Gifts in Wills (GIW) activities involving planning, goal setting, supporter cultivation, relationship management, moves management and performance measurement.

POSITION ACCOUNTABILITIES

RESPONSIBILITY	OUTCOME	
TEAR MISSION AND VALUES		
This position supports TEAR’s Australian program strategy to inspire and empower Australian Christians to respond to poverty and injustice.	Strategies are implemented that improve the experience of supporters engaging with TEAR and our supporter base is growing in their knowledge and response to global poverty.	Essential
Strategy Implementation		
<ol style="list-style-type: none"> TEAR has a growing number of supporters considering, intending and deciding to include a gift to TEAR in their Wills TEAR’s GIW strategy is embedded in our communications and fundraising strategy as a vital source of long-term income 	<ol style="list-style-type: none"> The number of Confirmed Bequestors is increasing (as agreed on a regular basis in work plans) Activities are in place to identify and cultivate supporters towards including a gift in their Wills. Key GIW messages are communicated through TEAR’s year-round publications and communications 	30%

<p>Relationship Management</p> <ol style="list-style-type: none"> Portfolio of Confirmed Bequestors and GIW prospects is managed to retain and grow number of Confirmed Bequestors Develop and implement an 'account plan' for each Confirmed Bequestors and key GIW prospects to drive engagement activities using move management methodologies 	<ol style="list-style-type: none"> Implement supporter engagements tailored to each supporter, including but not limited to: phone calls, emails, face-to-face meetings, program exposure visits Ensure supporters' needs are understood and met as part of tailored relationship 	<p>50%</p>
<p>Performance Measurement & Reporting</p> <ol style="list-style-type: none"> Work with Head of Fundraising and Supporter Insights Manager to conduct data analysis and profiling to effectively measure campaign and activity performance Report at agreed intervals on progress of GIW program especially relating to moves management KPIs and key insights 	<ol style="list-style-type: none"> Ensure relevant and accurate Salesforce reporting is developed, maintained and monitored to provide visibility to achievements and areas for improvement Supporter insights are created from measurement and reporting, informing improvements to campaign delivery 	<p>10%</p>
<p>Team Participation</p> <ol style="list-style-type: none"> Provide insight to team supervisor about TEAR's phone program and progress on achieving campaign goals. Work collaboratively with peers towards shared vision. Contribute to organisational culture and inspiration 	<ol style="list-style-type: none"> Your supervisor is kept informed of progress and in touch with the views and opinions of the supporter community Actively participate in regular team meetings, contributing to the co-creation of team culture, innovation and creativity Participate in, and/or lead staff devotions as part of a roster 	<p>10%</p>

POSITION REQUIREMENTS

MUST HAVE

- Understanding and strong commitment to TEAR's Christian ethos and values
- At least two years' experience working with GIW marketing and stewardship
- Demonstrated experience analysing and interpreting data, and monitoring and evaluating
- An ability to have conversations with people of a sensitive nature, with tact and discretion
- Self-motivated, resilient and enthusiastic attitude
- Experience using a CRM

HIGHLY REGARDED

- Knowledge of aid and development practices
- Experience in a results oriented sales environment

Everyone at TEAR is responsible for workplace safety both in terms of their own behaviour and taking action to resolve safety issues they become aware of.

The Bequests Manager will at all times carry out her/his responsibilities with due regard to TEAR Australia's commitment to safeguarding children and vulnerable people in accordance with TEAR's Safeguarding Policies.

TEAR values diversity and each staff member is expected to demonstrate a commitment to gender equality.

KEY POSITION RELATIONSHIPS**Internal**

- Head of Fundraising
- Australian Program Director
- Australian Program Leadership Team
- Chief Executive Officer
- Manager, Transformational Giving

External

- Supporters
- Law firms

TEAR MISSION

TEAR Australia is a Christian development, relief and advocacy organisation responding to global poverty and injustice. Our vision is for a just and compassionate world in which all people have the opportunity to achieve their God-given potential.

We will

- *Inform, challenge and empower Australian Christians to make biblically-shaped responses to poverty and injustice.*
- *Support community-based Christian groups, churches and mission organisations around the world as they work holistically with poor communities in development, relief and advocacy.*
- *Adhere to biblical teaching, and evaluate our work and attitudes in its light.*
- *Maintain a low-cost administration regime in order to maximize the funds allocated to project partners.*

TEAR VALUES

As a faith-based Christian organisation, TEAR Australia seeks to adhere to biblical teaching and evaluate work and attitudes in its light. Consequently TEAR Australia aspires to the following values:

A commitment to the poor

A commitment to the whole person

A commitment to justice

A commitment to prayer

A commitment to relationships

A commitment to participation

A commitment to excellence

A commitment to learn from others

A commitment to collaboration

A commitment to accountability