

BirdLife Australia

## High Value Donor and Gifts in Wills Co-ordinator

January 2021

## The Organisation

As Australia's only national bird conservation charity, we are on a mission to put birds and nature on the path to recovery within a decade, leading and facilitating action that halts biodiversity loss and restores ecosystems. We can only achieve this with the help and support afforded to us by our diverse stakeholders - donors and philanthropists, individual and corporate supporters, and like-minded conservation organisations.

BirdLife Australia is a diverse organisation with more than 200,000 supporters, donors, volunteers, campaigners and members, over 60 staff across Australia, and a network of more than 40 voluntary community groups.

Our growing network of people generously give their time, expertise, voice and financial support, standing together with us to help protect Australia's unique bird life.

BirdLife Australia takes a science and evidence-based approach to bird conservation. Where strong conservation plans are in place and well-resourced the evidence tells us that threatened species can be brought back from the brink of extinction. With a 100-plus year history and Australia's strongest and longest-lived collection of data and surveys, BirdLife Australia brings a wealth of observation and experience to the protection of native birds.

BirdLife Australia is truly local to global, with a network of more than 40 voluntary community groups on the ground in Australia and is the Australian member of the BirdLife International partnership, the world's largest partnership for conservation.

BirdLife Australia is governed by an elected Board of Directors which meets regularly, and day-to-day operations are managed by the Chief Executive Officer and Leadership Team.

A significant part of BirdLife Australia's work is done by volunteers acting either alone, in organised groups or serving on Committees. It is important that all staff understand and appreciate the contribution made by volunteers, and are also mindful of their varying skills, interests and motivations.

We acknowledge the important role Traditional Owners throughout Australia have played, and continue to play, caring for Country. We acknowledge their continuing connection to land, sea and community and pay respect to Traditional Owners and their cultures, and to their Elders both past and present. BirdLife Australia endeavours to facilitate the further engagement of Indigenous Australians in the research and conservation of our native birds.

BirdLife Australia is governed by an elected Board of Directors which meets quarterly, and day-to-day operations are managed by the Chief Executive Officer.

A significant part of BirdLife Australia's work is done by volunteers acting either alone, in organised groups or serving on Committees. It is important that all staff understand and appreciate the contribution made by volunteers, and are also mindful of their varying skills, interests and motivations.

BirdLife Australia acknowledges the important role Traditional Owners throughout Australia have played, and continue to play, caring for Country. We acknowledge their continuing connection to land, sea and community and pay respect to Traditional Owners and their cultures, and to their Elders both past and present. BirdLife Australia endeavours to facilitate the further engagement of Indigenous Australians in the research and conservation of our native birds.

## The Role

### Position Title

High Value Donor and Gifts in Wills Co-ordinator

### Position Objective

Responsible for development and delivery of BirdLife Australia's Gifts in Wills program and High Value donor stewarding. The role works closely with the Major Gifts Lead, Single Gifts & Appeals Officer and Regular Giving Co-ordinator on acquisition, conversion and management of high value donors and Gift in Will donors.

### Status

This is a fulltime ongoing position offered on a 3-year contract. A continuation to the contract after three years would be offered subject to acceptable performance and available funding.

### Staff Reporting

None

### Remuneration / Job Level

Level 3, Grade based on program complexity and scale, experience and expertise and four weeks annual leave.

### Location

The position will be based at BirdLife Australia National Office in Carlton, Melbourne.

### Reporting

This position reports to the Individual and Community Giving Team Lead.

### Key Relationships

**Internal:** CEO, Team Managers, Development Team Members, Engagement Manager, Communications Manager, Public Affairs Manager, Finance team, Supporter Services and other staff as required.

**External:** Existing and new mid to high value donors and major donor prospects, current supporters with intention to leave a bequest, suppliers, service providers, legal and financial professionals and consultants

### Travel Requirements

Some travel within Australia will be required.

### Duties

#### High value donor stewarding

- Develop and implement high-value fundraising and stewardship activities to deepen engagement and exceed fundraising income targets.
- Plan and coordinate tailored journeys for high value supporters; with particular focus on gift acknowledgment, impact storytelling, surveys, upgrade opportunities and digital and event engagement and to ensure retention and income growth are maximised.
- Monitor and track donor movement and identify opportunities for value uplift.
- Inspire dedicated and loyal high value supporters to raise funds through workplace giving, peer-to-peer fundraising and events.
- Support the Development Manager, Major Gifts Lead and CEO to strengthen systems and build donor insights to better support donor journeys and experience.
- Maintain and update donor records and work with the Digital Transformation team to ensure the transition of supporter information to a new CRM.

## **Gifts in Wills coordination and engagement**

- Plan, schedule and coordinate Gifts in Wills stewardship communications and events to build engagement with both prospect and confirmed bequest supporters.
- Identify and develop Gift in Wills prospects and implement donor acquisition.
- Manage supporter enquires and promptly follow-up those who have expressed leaving a bequest to BirdLife Australia.
- Manage the onboarding of confirmed gift in will donors including welcome communications.
- Build and maintain relationships with confirmed gift in will donors.
- Support the Development Manager, Major Gifts Lead, and finance team in estate administration liaising with lawyers and executors ensuring appropriate documentation, timely correspondence and tracking stages of wills.
- Build donor insights on confirmed and realised gift in will donors to better support their donor journeys and inform conversion strategy.
- Maintain and update donor records and work with the Digital Transformation team to ensure the transition of supporter information to a new CRM.
- Other duties as directed by your Manager from time to time.

## **Selection Criteria**

### **Essential**

- Demonstrated experience and knowledge in fundraising, marketing or sales and the theories and practices of fundraising.
- Track record of achievement in donor / bequestor engagement and stewarding.
- Excellent written, oral and interpersonal communication skills, including the ability to champion BirdLife Australia and its mission.
- Ability to build rapport with the diverse range of BirdLife Australia supporters – volunteers, members, donors.
- Ability to manage confidential and sensitive information about both the organisation and its supporters.
- Demonstrated ability to interact successfully with senior people in the philanthropic, commercial and public sectors.
- Demonstrated skill working with CRM systems and databases (eg Salesforce, Raisers Edge)etc.
- Strong planning, time management and organising skills.
- Ability to interpret and communicate technical information into plain language.
- Analyse and solve problems with good humour and flexibility.
- A willingness and capacity to work flexible hours as and when required.
- Ability to work well with minimum supervision, prioritise and be delivery focused.

### **Desirable**

- Writing donor centric communications
- An affinity with the aims and philosophy of a member-based, not-for-profit conservation organisation.
- An understanding of the role of philanthropy for a not-for-profit and a desire to work in the sector.
- Experience or knowledge of communication and marketing techniques that support fundraising.
- Proven ability to liaise and negotiate effectively with a range of stakeholders.
- Some knowledge and interest in environmental, ecological or avian issues.

## Living our Values

<i>Passion</i>	<i>Excellence</i>	<i>Leadership</i>	<i>Collaboration</i>	<i>Integrity</i>	<i>Impact</i>
We bring people together around a love of nature	Science and knowledge is at the centre of everything we do	We empower and inspire people to lead with courage and purpose	We embrace diversity and work in partnership with mutual respect	Our success is based on experience, honesty, trust and fairness	We think globally, lead nationally and act locally

## OH&S statement

Employees and potential employees should be aware that the requirements of the position include, but are not limited to:

- Limited attendance at evening or weekend meetings
- Possible driving for extended periods and interstate travel
- Long periods of sedentary desk and computer duties and telephone use
- Possible lifting and moving of heavy equipment and objects
- Overnight and weekend work in the field and at conferences