



The Carmelites
Australia and East Timor
community • prayer • action

POSITION DESCRIPTION

POSITION TITLE	Philanthropy Lead – Major Gifts and Gifts In Will
POSITION TYPE / HOURS	0.6FTE – 22.8 hours 12 month Contract with view of renewal
LOCATION	75 Wright Street Middle Park. Flexible working arrangement is available

ORGANISATIONAL CONTEXT

The Carmelites of Australia and Timor-Leste (TCATL) are part of a worldwide Catholic Order working with communities across both countries. Under this Charity brand we offer spiritual and practical support to people facing social, economic and life challenges and support the training of the next generation of Carmelites.

In 2020 TCATL established a Charity 'Carmel Impact Limited' (CIL) to help those in need in Timor-Leste. Our vision is to build a future in which East Timorese people have pathways to quality education and more opportunities transforming lives and building communities together to create lasting positive change.

The Philanthropy Lead will work across both charity brands to develop and steward strong relationships with major donors, prospects and manage our Gifts in Will program.

We are a small organisation with most of our donors supporting both charity arms of our work.

PURPOSE OF THIS ROLE

The Major Gifts and Gifts in Will Lead will drive the acquisition, engagement, management and retention of supporters to these programs. This role is about developing and implementing a long-term strategy and stewardship program for major donors and bequestors and cultivating and nurturing new and existing donors.

You will be responsible for increasing major gift giving and increasing financial support through Gifts in Will to ensure the success of both Charities.

POSITION SUMMARY

This role will drive and develop income growth in a manner consistent with the values of The Carmelites and its existing fundraising programs. The Philanthropy Lead will work closely with the Director of Fundraising Development, the fundraising team, and other staff members across the whole organisation to build a successful Major Gift and Gifts in Will fundraising program.

This role reports to the Director of Fundraising and Development and leads the following activities:

- Refresh, develop and implement the Gift in Will and Major Gifts program
- Develop and nurture new and existing major donors and bequestors, with the aim to maximise the donor experience and encourage ongoing engagement
- Execute a stewardship program to recognise and thank bequestors and major givers including events, personalised communications, collateral and online content
- Manage the tracking of activities with a pipeline system in our CRM software program
- Monitor and report KPIs for the programs on a monthly basis

KEY AREAS OF RESPONSIBILITY AND PERFORMANCE INDICATORS

PERFORMANCE INDICATORS	OUTCOMES SOUGHT
Leading, planning and Reporting	
<ul style="list-style-type: none"> • Develop and implement strategies to grow the Gifts in Will and Major Gifts programs in line with determined KPI's • Plan a yearly schedule to develop tailored communications and acquisition activities for both programs • Implement strategies to grow revenue from major donors • Determine opportunities to deepen bequestors and major donors engagement to TCATL and CIL • Evaluate, monitor and report on the ongoing performance of donor strategies 	<ul style="list-style-type: none"> • Delivery of strategy, targets and monitoring of budgets for both program areas
Bequests	
<ul style="list-style-type: none"> • Identify potential bequestors in the database and across our audience groups • Develop and deliver offline and online communications promoting Gifts in Will • Deliver a stewardship program that includes events, phone calls, mail, visits, supporter survey etc, • Assist with estate administration following up probate lawyers, and updating bequest income data into the CRM 	<ul style="list-style-type: none"> • Prospects are provided with timely and relevant information about Gifts in Will • Prospects are provided with opportunities to inform us of their intentions to leave a Gift in their Will • An effective stewardship plan is executed to recognise bequestors in their lifetime • The number of confirmed bequestors is increased • Bequestors remain connected • Bequest information is recorded to ensure long-term integrity and accuracy
Major Gifts	
<ul style="list-style-type: none"> • Identify current and prospective major donors from the database • Determine and implement tactics to lift their giving levels • Prepare collateral and propose major gift giving 	<ul style="list-style-type: none"> • Establish, and monitor a major gift recognition plan and pipeline in our CRM system • An effective stewardship plan is

<ul style="list-style-type: none"> opportunities which match donor interest and ability • Work with the fundraising team to identify, steward and convert overlapping major donors especially with the Trust & Foundation Lead to identify opportunities through PAF's • Identify potential major donor prospects outside the database and commence a cultivation process • Build and maintain personalised relationships with major donors or facilitate personalised relationship between major donors and the Carmelites Leadership team • Create, implement and manage a long-term multi-level major gift program in line with the organisation strategic plans and financial goals 	<p>executed to ensuring high retention and lift in giving</p> <ul style="list-style-type: none"> • Cultivated potential major donors both from the database and outside towards realising significant major gifts • Specific quoters will be discussed with the successful candidate • Major gift information is recorded to ensure long-term integrity and accuracy • Gained an understanding of fundraising priorities needing support through major gifts.
Marketing	
<ul style="list-style-type: none"> • Develop marketing collateral of projects to major donors • Develop the case for support tailoring to each donor based on their - links to TCATL or CIL, interests, abilities • Contribute to the fundraising and marketing collateral including newsletter articles, EDM's or website 	<ul style="list-style-type: none"> • Campaigns and events are on brand, impactful and aligned with organisational strategy. • Evidence of a planned approach with timelines met or achieved early
Budget	
<ul style="list-style-type: none"> • Assist the Director of Fundraising Development in developing the annual budget for Gifts in Will and Major Gifts programs • Manage budget allocations • Reach set income targets from programs and campaigns as measured against the annual budget 	<ul style="list-style-type: none"> • Specific budgets are achieved or exceeded • Reporting is proactive and timely

KEY SELECTION CRITERIA

Essential

- Demonstrated experience in bequest or major gifts programs
- A strong understanding of stewardship principles as they relate to bequests and major gifts
- Experience in developing and maintaining relationships with a high degree of maturity and empathy
- Confident and mature attitude with superior communication, presentation and influencing skills
 - Strong planning and organisational skills
- Managing successful income raising strategies
- Working to targets and implementing new strategies for the sustainability of an organisation
- Proactive, tenacious, self –starter and highly self-motivated
- The ability to act autonomously as well as work as part of a team
- Experience utilising CRM database software

Desirable

- 5 years plus experience as a philanthropic lead in major gifts and Gifts in Will
- Having a Christian attitude to faith and values
- Experience working with or an understanding of CRM database software
- Tertiary degree in Sales, Marketing or Fundraising
- Membership of the Fundraising Institute of Australia

OTHER POSITION SPECIFICS

This position description is intended to describe the general nature and level of work required. It is not intended to be an exhaustive list of all responsibilities, duties and skills required of the position.

Satisfactory completion of National Police Check and Working with Children Check is a condition of employment.

HOW TO APPLY

Please submit your current CV and a cover letter addressing the key essential selection criteria above explaining why you are the right person for this role. Only shortlisted applicants will be contacted.

Applicants are encouraged to apply as soon as possible as applications will be assessed when received and the interviewing process will take place as applications are shortlisted.

This is an open recruitment as we are looking for the right candidate with the right experience and fit to the organisation.

Submit your application to Nancy Mercurio at director@carmelimpact.org.au. Please use the position title in the subject line of your email. For enquires or more information please phone Nancy on 03 9690 8822 or 0488 224 647.