

## POSITION DESCRIPTION

<b>Position Title</b>	<b>Gifts in Wills Manager</b>
<b>Reports to (Title)</b>	<b>Associate Director, Philanthropy</b>
<b>Group Director/ Chief</b>	<b>Director, Cabrini Foundation</b>
<b>Department</b>	<b>Cabrini Foundation</b>
<b>Position Location</b>	<b>Cabrini Malvern</b>
<b>Award/Agreement</b>	<b>Salary &amp; Conditions in accordance with Contract of Employment</b>
<b>Delegation of Authority Level</b>	<b>N/A</b>

### Position Summary & Role Purpose

The Gifts in Wills Manager is responsible for developing professional, personable and long-term relationships with a large portfolio bequest donors to secure significant donations and future pledges. The role's primary focus is relationship management and growing the portfolio of current and prospective bequest supporters through delivering strategic and personalised supporter journeys to ensure their continued giving or confirming a bequest to Cabrini.

This role will also support the Associate Director, Philanthropy with donor accounts where required and work collaboratively with Foundation colleagues on engagement activities to support the overall growth and retention of high value donors for Cabrini.

### Key Result Areas

#### 1. Key Responsibilities, Outcomes and Activities

##### 1.1 Leadership and management

- Develop relationships with a portfolio of approximately 200 existing and prospective supporters and manage these relationships in order to translate them into significant confirmed bequests.
- Work as part of the Foundation team, contribute to the development and delivery of the Foundations' strategic and operational plans.
- Work collaboratively with the other Donor Relations Manager, Communications and Engagement Manager and the Events and Partnerships Manager on invites, newsletters, impact reports and events that on engagement activities to support the overall growth and retention of bequest supporters (such as luncheons, research forums and meet and greet events).

##### 1.2 Operational Responsibilities

- Manage own pipeline of bequest supporters from identification and research, engagement, conversion and stewardship
- Prepare and arrange all correspondence and engagement activities for bequest supporters in pipeline that include interactions by phone, email, mail, events and face to face meetings, with the goal of securing donations or converting and confirming bequest pledges
- In line with the Foundation Stewardship and Engagement strategy, deliver specific engagement activities to support the retention, conversion or upgrade of gift in will donors
- Work collaboratively with Foundation colleagues to ensure a cohesive engagement and stewardship for shared supporters (i.e. major donors or direct mail donors)

- Coordinate the probate process, including communicating with Executors and liaising with Cabrini colleagues for the timely receipting of estate gifts
- Ensure the Associate Director, Philanthropy, the Director and relevant senior Cabrini leaders are engaged with key donors or in high value or complex estates cases, as required
- Work with the Associate Director, Philanthropy, the Database Manager and Individual Giving Manager to identify new prospective donors and engage them appropriately
- Keep up-to-date on Cabrini's strategic plan, programs and funding priorities to inform interactions with donors
- Prepare reports on the activities with own portfolio including donations received and due and moves management
- Provide support for Foundation events and capital campaign activities as required

### **1.3 Resource Management**

- Ensure all information and communications with donors are recorded in the database in a timely and accurate manner and ensure all supporter information is compliant with privacy legislation
- Adherence to the Cabrini codes of professional conduct, code of ethics, standards of practice and competencies, Mission, Values and Vision, and the Behaviours that Matter

### **1.4 Contributes to the achievement of professional expertise for self and direct reports through:**

- Maintenance of ongoing personal professional development / continuing education
- Personal application of the Cabrini performance management framework
- Identifying, encouraging and monitoring the continuing development of others within a learning culture.

## **2. Work Health and Safety**

Cabrini is committed to providing facilities and services which minimise the risk of physical and psychosocial harm to our workforce, patients, residents, clients and visitors, so far as is reasonably practicable.

To achieve this, managers are required to implement, in consultation with their employees, the components of Cabrini's work health and safety management systems (the collection of policies, procedures, guidelines, other related documents and resources) to control the hazards that their employees, and any other person exposed to the work they do, may face. The WHS management system enshrines a risk management approach to managing hazards. For any hazards not explicitly covered in the WHS management system, managers are required to assess and control hazards as outlined in the WHS Risk Management Procedure.

Employees are responsible to work in a way that protects their own health and safety and that of others who may be affected by their actions. This includes following the policies and procedures from the WHS management system that apply to their work, any local processes and instructions from their manager regarding how work is to be performed. Employees are responsible to report hazards, incidents and injuries to their manager.

The Cabrini WHS Department facilitate the ongoing development and review of the WHS management system, build the capability of managers to assess and manage wellbeing, hazards, incidents and injuries and provide advice and support in the management of these areas.

The Cabrini Work Health and Safety Responsibilities Procedure defines the responsibilities of employees at all levels of the organisation – Chief Executive; Group Directors; General Managers; Managers; those with specified work health and safety responsibilities; and all other employees. Please refer to the procedure for more details of the responsibilities associated with your role.

### 3. Safety and Quality

It is the responsibility of all staff at Cabrini to ensure that they provide safe high quality care to our patients, residents and service users. Safe care means accepting individual and shared responsibility as well as compliance with the Cabrini policies and protocols by all staff.

### 4. Child Safety

Cabrini complies with the Victorian Child Safe Standards, as updated in 2022. All children who come to Cabrini have a right to feel and be safe. Cabrini policies and practices aim to keep children safe from harm. All Cabrini staff must comply with all policies as amended from time to time including the following:

- Child safe organisational framework
- Child safety code of conduct
- Child safety reporting policy and procedure

#### Organisational Relationships

- Reports directly to the Associate Director, Philanthropy
- Maintains and builds close collaborative working relationships with internal and external stakeholders including (but not limited to) other staff in the Foundation; donors and volunteers; suppliers.

#### Committee Membership

**The Gifts in Wills Manager will participate as a member of the following committees:**

- Relevant external committees as a representative of Cabrini
- As directed by the Associate Director, Philanthropy

#### Staff Development

**The Gifts in Wills Manager will demonstrate a commitment to personal and professional development of self and staff by:**

- Participating in professional development programs
- Maintaining own skills and knowledge
- Remaining up to date with contemporary human resources practices
- Contributing to the Cabrini professional development program as required
- Participating in performance reviews in accordance with Cabrini policy

#### Key Competencies

**The Gifts in Wills Manager must demonstrate the following requirements:**

##### **ESSENTIAL**

##### **Educational/Vocational**

- Relevant tertiary qualification in marketing, communications, commerce or related field and/or substantial experience in fundraising, business development or marketing

##### **Registration**

- Membership of the Fundraising Institute of Australia, highly regarded

##### **Experience**

- Demonstrated experience in a similar account management, customer service, sales or face-to-face role, preferably in fundraising.

- Strong communication and interpersonal skills, including the ability to develop and maintain personable yet professional relationships.
- Effective communication and interpersonal skills, including the ability to develop and maintain working relationships with internal and external stakeholders.
- Demonstrated attention to detail and ability to identify and resolve complex problems in a timely manner.
- Proven organisational and time management skills to meet deadlines, and work autonomously.
- Ability to carry out duties professionally, with tact and diplomacy ensuring privacy and confidentiality requirements are maintained.
- Commitment to actively participate as a member of the Foundation team and to work cooperatively and collaboratively to achieve results.
- Highly motivated with an ability to work both autonomously and as part of a team.

### **Knowledge**

- Demonstrated knowledge and understanding of fundraising principles, as well as the current fundraising environment and trends
- Advanced skills in MS Office, including Word, Excel and PowerPoint and databases.

### **Conditions of Employment**

Salary and conditions in accordance with the Cabrini Contract of Employment / Employment Agreement

### **Cabrini Mission, Values and Behaviours that Matter**

#### **Our mission**

#### **WHO WE ARE**

We are a Catholic healthcare service inspired by the spirit and vision of Mother Cabrini and the Missionary Sisters of the Sacred Heart of Jesus.

#### **WHAT WE BELIEVE**

We are a community of care, reaching out with compassion, integrity, courage and respect to all we serve.

#### **WHAT WE DO**

We provide excellence in all of our services and work to identify and meet unmet need.

#### **Our values**

***Our values form the base of our mission, are built around what we believe and drive how we act. They are drawn from Mother Cabrini's life and reflect her heart, her spirit, her conviction and her approach.***

#### **Compassion**

Our drive to care is not just a professional duty to provide excellent quality care but is born of a heartfelt compassion for those in need, motivated by God's love for all people.

- We care deeply about each and every person we serve
- We respond willingly and positively to help meet the needs of those around us
- We put people first as we look to provide extra support and care, beyond our professional duties
- We promote a sense of belonging and community.

#### **Integrity**

We believe in the power of hope to transform people's lives and remain faithful to the bold healing mission and legacy of Mother Cabrini.

- We remain true to our beliefs at all times – our mission and values are non-negotiable
- We are welcoming, hospitable and find comfort and motivation in the context of God's all-inclusive love
- We look for the good in each other and recognise each person's contribution as we work together to provide the best possible experience for our patients, residents and their families
- We are honest and reliable, making decisions that are consistent with our mission and taking responsibility for our own actions.

## Courage

We have the strength, determination, vision and conviction to continue the work of Mother Cabrini and the Missionary Sisters.

- We care for the whole person – spiritually, physically and emotionally – creating an environment of hope and healing
- We rise up to challenges and opportunities, meeting them with an open mind and a positive attitude
- We maintain the courage of our convictions and express our values through our actions
- We continually look beyond our current services to help support and engage with those who are marginalised.

## Respect

We believe that every person is worthy of the utmost respect and the best possible healthcare. We know that our resources are entrusted to us to use for the benefit of others.

- We uphold the worth and dignity of all people, regardless of gender, race, age, ability and social position and treat them with courtesy, respect, equality and justice
- We respect ourselves, our colleagues and the excellence of the services we deliver
- We identify and respond to emerging healthcare needs in our community
- We manage our resources wisely and actively seek to minimise our impact on the environment.

## Behaviours that matter

***Our values are displayed in the way in which we behave in every interaction – with each other, with our patients and residents, with their families and carers, and with visitors and other customers.***

The behaviours that matter have been identified through consultation with staff. They are the minimum standard expected for all who work at Cabrini (employees, volunteers and accredited staff). They describe the organisational culture that we think is fundamental to our mission to “provide excellence in all of our services”.

Unacceptable behaviours have also been identified and described as follows. These behaviours are inconsistent with our values, have a detrimental effect on others and prevent us from achieving our mission and quality goals. If you experience or witness these behaviours, please speak up. If you are unable to address the issue yourself, advise your manager, another senior member of staff or People and Culture.

### We are committed to safety and quality:

Behaviours that matter	Unacceptable behaviours
We put patient/resident safety first	We are careless, impulsive or take unnecessary risks that may cause harm to patients/residents
We ask questions to understand the problem	We jump to conclusions and look for someone to blame
We admit when we make a mistake and seek a solution	We try to cover up or make excuses for mistakes
We look for opportunities to improve our care and services	We resist or sabotage change
We speak up when we see behaviour that is inconsistent with our values	We encourage or participate in poor behaviour

### We are here to provide service:

Behaviours that matter	Unacceptable behaviours
We greet everyone warmly	We are rude or discourteous
We are always kind and caring	We are arrogant or demeaning
We give our full attention to the person speaking to us	We are distracted, impatient or dismissive

We communicate openly, sensitively and in a timely manner	We are dominating, abrupt or sarcastic
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**We work together to achieve the best outcome:**

Behaviours that matter	Unacceptable behaviours
We are quick to offer help without waiting to be asked	We refuse to help even when it is clearly required
We share information readily to promote the best care and services	We withhold information or are competitive to the detriment of others
We do as we say we will	We are unreliable or inconsistent
We encourage and support each other	We berate or humiliate others
We give praise for a job well done	We are excessively critical or devalue the contributions of others

**We exhibit a positive attitude:**

Behaviours that matter	Unacceptable behaviours
We approach our day with energy and enthusiasm	We are negative or apathetic
We look for the best in people	We are judgemental and put others down
We take pride in our personal appearance	We look dishevelled, dirty or have offensive personal odour

**We want to build a just and sustainable community:**

Behaviours that matter	Unacceptable behaviours
We treat each other fairly	We are hostile or abuse our power
We use our resources responsibly	We are wasteful or extravagant
We consider the environmental impact of all we do	We are thoughtless or careless

**APPROVAL**

*The above statements are intended to describe the general nature and level of work being performed by the incumbent of this role. This document may be revised or updated at any time in line with role, and/or organisational changes. Any such changes will be communicated with the appointed person.*

**I certify that this position description is an accurate description of the responsibilities assigned to the role**

**Authorised:**

\_\_\_\_\_ **Director, Cabrini Foundation**

\_\_\_\_\_ **Date**