



# Trust for Nature

## Position Description

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<b>Position</b>	Relationship Manager – Legacy Giving & Gifts in Wills
<b>Department</b>	Development
<b>Location</b>	Melbourne
<b>Employment status</b>	Full Time
<b>Classification</b>	TFN Grade 5.1
<b>Reporting line</b>	Director of Development

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### About us

Trust for Nature is a not-for-profit organisation that works to protect native plants and wildlife in cooperation with private landowners.

Created in 1972 under the *Victorian Conservation Trust Act 1972 (Vic)*, Trust for Nature has a proud history of working across the government, not-for profit and private sectors to achieve permanent protection of important conservation land across Victoria. We have a culture that supports and inspires conservation achievement and personal development, both within the workplace and beyond.

### Our Vision

A future in which Victoria's nature is valued, protected and thriving.

### Our Purpose

We work with Victorians to protect nature on private land forever.

### About the role

Reporting to the Director of Development, this relationship management and fundraising role is tasked with growing and nurturing Trust for Nature's pipeline of relationships with covenantors, donors, prospects and partners who would like to give cash and or non-cash (land) in support of our work.

Due to the nature of our work, there are a mix of circumstances and arrangements/options available to potential donors - including living bequests, traditional Gifts in Wills and other nuanced arrangements involving land donations. These options can be explored individually according to their circumstances. Trust for Nature has internal expertise – legal and real estate professionals – to support land donations and legacy gifts.

With responsibility for Trust for Nature's entire Gift in Will portfolio, the Relationship Manager – Legacy Giving & GiW's, will aim to build a pipeline of confirmed bequests and legacy gifts to deliver impact now and into the future.

The Relationship Manager – Legacy Giving & GiW's will spend a large portion of their time donor facing, meeting with donors weekly in Melbourne and around the state as opportunities arise. Successful stakeholder management will enable this role to connect with donors and covenantors as well as regional teams.

Trust for Nature is seeking to significantly grow philanthropic revenue and attract high profile and high-capacity partners.

### Key Responsibilities

The primary responsibilities of the role include:

- Ongoing engagement and relationship management for a portfolio of confirmed bequestors and bequest prospects.
- Ensure effective transfer of bequest gifts to TFN including liaison with executors, TFN general counsel and finance staff, and next of kin.
- Support internal stakeholders (regional staff in particular) in developing their knowledge of Gift in Wills and the various options available to interested parties.
- Collaborate with regional teams to identify interested covenantors, donors and prospects.
- Work with the Director of Development and the Development team to develop and implement a comprehensive 3-year growth strategy. (This will consist of a multi-channel approach including digital, direct mail, surveys, personal contact (visits/phone) and events.
- Work with the Director of Development and the Finance team to create and monitor an annual plan including income forecasting, budgets, and growth KPIs for each stream identified in the strategy.
- Monitor and evaluate bequest program performance against annual plan and targets including regular pipeline reporting on estate administration progress.
- Working with the Director of Development and the finance team, develop a suite of reports to assess the performance of, and identify improvements to the bequest program, as well as a conversion funnel with the total number of enquiries/intending/confirmed.
- Assist in planning and executing other philanthropic or community engagement activities as required.
- Other duties as requested by the Director of Development.

### Key Relationships

- Director of Development
- CEO (Fundraiser in Chief)
- Executive & Senior Management Staff
- Board of Directors
- The Development Team
- Trust for Nature regional staff

## TFN POSITION DESCRIPTION

- General Counsel
- Real Estate
- Finance teams
- Donors and supporters (existing and potential)
- Philanthropic and corporate contacts
- Partner organisations
- Other key stakeholders

### Key Selection Criteria

1. Demonstrable Gift in Will fundraising expertise, knowing Gift in Wills and legacy giving in Australia incredibly well.
2. A proven track record of achieving results for past employers, including budget management skills.
3. Demonstrated relationship building and relationship management skills, including the ability to identify, initiate and sustain new relationships, work collaboratively, and promote cooperation with internal and external stakeholders.
4. Excellent planning and organisation skills, particularly relating to coordinating meetings, events and touchpoints for donors and prospects.
5. Attention to detail with a commitment to quality that enables you to communicate and influence effectively.
6. Internal stakeholder leadership that is results and outcomes focused.
7. Demonstrated leadership and or mentorship skills that will enable you to share your knowledge and experience widely with the TFN team.
8. Proficient in Microsoft Office applications and Salesforce or similar CRM/fundraising software
9. Tertiary qualifications in business administration, marketing or a formal fundraising qualification would be highly regarded.

### Trust for Nature Values

Our values underpin everything we do. How we deliver our work is as important as the outcomes we achieve for the Victorian Community. Our values are the foundation of our culture and guide how we work together, with our stakeholders, partners and the community.

The Trust's values form the acronym **CREST – Collaboration, Respect, Efficiency, Support and Trust**.

### Specific requirements for this position

- A National Police Check is required to be conducted as part of the selection process.
- The position requires frequent travel throughout Victoria, therefore a current Driver's Licence is required.

### Health and Safety requirements

Trust for Nature is committed to protecting the safety and wellbeing of its people and ensuring safety is integral to how do our work. In realising this commitment Trust for Nature complies with all relevant health and safety laws including the *Occupational Health and Safety (OH&S) Act 2004* (with its associated regulations and codes).

### **Join a Workplace Based on Fair Employment**

The Trust offers fair employment and career opportunities where possible. We aim to attract a diverse pool of applicants and focus on the genuine and essential requirements of the job and being consistent and fair in our treatment of applicants.

### **Equal Opportunity Employer**

The Trust is an equal opportunity employer and welcomes applicants from a diverse range of backgrounds. It is a policy of the Trust to provide reasonable adjustments for persons with a disability. If you need assistance or adjustments to fully participate in the application or interview process, please use the contact listed in the role advertisement.

### **Balancing your Life**

We understand that life balance is an important part of our employees' lives. Wherever possible the Trust offers a range of flexible arrangements to enable you to balance your work with other commitments and activities including family, health, study, carer responsibilities, hobbies and life/career aspirations. We provide various options such as flexible start and finish times, working part time, job sharing, working from home, and paid leave provisions that can be negotiated with your manager to help balance your personal commitments with the demands of the role.

### **Privacy Notification**

Trust for Nature affirms that the collection and handling of applications and personal information will be consistent with the requirements of the *Privacy and Data Protection Act 2014 (Vic)*.

### **Other relevant information**

- The terms and conditions of employment are similar to those applying in the Victorian Public Service and will be governed by the enterprise agreement applying to Trust staff;
- The position is located in Collins St, Melbourne CBD.
- The position requires frequent travel across Victoria.

The position description may need to be amended occasionally due to variations in responsibilities and organisational requirements. Changes to the position description will be consistent with the purpose for which the position was established.