



Gifts in Wills Coordinator

Strategic Marketing & Fundraising

Job Title:	Gift in Wills Coordinator
Department:	Strategic Marketing and Fundraising
Reports to:	Strategic Future Planning Manager
Position Purpose:	To support the drive to grow revenue for gifts in Wills
Responsible For:	The Gift in Wills Coordinator is responsible for the Gifts in Wills administration, providing support in the execution of the Gift in Wills program and working in relationship and engagement development with probable benefactors.
Key Challenges:	Establishment of a new program Transition to the Salesforce CRM Poor visibility of donor journey Geographical reach across several states
Key Result Areas: Include -	Efficient and timely administration of Wills and Estates Efficient support for the development of a multi-faceted recognition program Contribution to a transformed internal culture surrounding Gift in Wills Successful development of the Gift in Wills program Ability to inspire volunteers and staff

A. ORGANISATION DIMENSIONS

3 UP MANAGER'S POSITION

Strategic Future Planning Manager

Gifts in Wills Coordinator



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Position Dimensions:	
Budget:	
Staff Numbers:	N/A
Geographical Spread/Breadth:	ACT, NSW, TAS and VIC
Other:	
Mandatory Training Requirements:	

B. JOB REQUIREMENTS

Key Result Area 1	Support in the Execution of the Gift in Wills program
	Job holder is successful when:
Execute a range of diverse strategies to identify, solicit, cultivate and steward bequest prospects.	A variety of methods are implemented for bequest prospecting.
Manage the appropriate stewardship of confirmed benefactors.	Benefactors are engaged and updated information is added to their database record.
Implement a multi-faceted recognition program for benefactors.	Recognition programs are developed and accessible.
Ensure that the subject matter of bequests is socialised with the whole organisation via a variety of mediums.	The organisation is aware of and engaged in the bequest strategy.
Contribute to the creation of compelling and supportive case for support which can be translated into communication pieces, presentations and similar.	Demonstrated collaboration with Service Innovation and Strategic Fundraising and Marketing to develop a communications plan.
Contribute to the creation of testimonials which can be translated into print and video	Testimonials are obtained from Benefactors



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Key Result Area 2	Integrate and Convert Supporters	
Key Tasks: Input responsibilities that relate to stakeholder engagement and relationships held both inside and outside the organisation. For example:	Job holder is successful when:	
Work collaboratively with the donor and fundraising teams to support the donor journey and execute the strategy to convert existing supporters to benefactors.	Agreed percentage of successful conversions of supporters met.	
Work with external partners and suppliers to ensure maximum value for money achieved.	Efficient relationships are developed with external partners and suppliers	

Key Result Area 3	Fundraising Database Management	
Key Tasks: Update with administrative responsibilities (reporting requirements, budget responsibilities etc.)	Job holder is successful when: Examples:	
Maintain a robust moves management strategy for bequest prospects and benefactors on Salesforce	<ul style="list-style-type: none"> Budget is achieved. Strategic needs are met within agreed budget. 	
Regularly update Salesforce with bequest activity.	A moves management strategy is implemented and communicated with relevant stakeholders	
Work with the Fundraising Data Analyst and Salesforce representative to realise the full potential of the database.	Bequest information on Salesforce is up to date and easily accessible.	
	<ul style="list-style-type: none"> Analysis of trends and revenue predications are delivered. Regular reports are provided on the performance of the portfolio 	



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Key Result Area 4	Administration
Key Tasks: Update with administrative responsibilities (reporting requirements, budget responsibilities etc.)	Job holder is successful when: Examples: <ul style="list-style-type: none"> • Budget is achieved. • Strategic needs are met within agreed budget.
Maintain accurate and detailed records of the administration of estates, bequests and anticipated bequests.	Wills and Estates are administered efficiently.
Ensure accurate recording and reporting of income from bequests.	Accurate reporting is provided.
Prepare regular reports on income generation including pipeline reporting and expenditure.	Accurate reporting is provided.
Ensure colleagues have all relevant information required to perform their duties and established standards are maintained.	Communication is consistent and clear.
Plan workload to ensure resources are used effectively and forward plan time allocation	Manager is aware of priorities and workload. Plans are rolled out to best of the resources provided.
Maintain accurate and detailed record of expenses	Budget is achieved
Maintain accurate and detailed record of activities	Efficient record of how the program is developing

C. PURPOSE AND VALUES REQUIREMENTS

Key Result Area 4	Values, Culture, Behaviours
<ul style="list-style-type: none"> • Actively support MS' purpose, value, service promise and strategic vision. • Operate in line with MS' policies, procedure and practices. • Promote and work within MS' customer service delivery principles. • Positively and constructively represent the organisation to external contacts at all opportunities. • Behave in a way that contributes to a workplace that is free of discrimination, harassment and bullying behaviour at all times. 	Job Holder is successful when: <ul style="list-style-type: none"> • Values are adhered to and demonstrated in daily practice • Values form an integral part of the way employees conduct their presence in the workplace. • The MS Service Promise and Behaviours are demonstrated in daily practice.



<ul style="list-style-type: none"> • Actively demonstrate and embed into every day work the MS Service Promise & Foundation Behaviours. • Ensure the health, safety and welfare of self, co-workers and others. • Follow all reasonable directions given by the organisation. • Support, promote and show sensitivity to diversity in the work place. 	
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MS Service Promise

First Contact – I am First Contract, a true ambassador for MS.

Think Yes – I am positive and committed to MS, its customers, people & the MS community.

Act Now – I am accountable for delivering timely and quality outcomes.

Push Ahead – I am focussed on making improvements and finding new ways to push ahead.

D. EMPLOYMENT SCREENING REQUIREMENTS

<i>Must be completed prior to commencing employment</i>	√
• National Police Check (to be carried out by MS)	
• International Police Check if lived overseas for longer than 12 months in the last 10 years (to be provided by the applicant)	
• Right to Work in Australia (Certified copy of Passport/Visa to be provided by the applicant)	
• Disability Worker Exclusion Scheme check (Victorian Residential Workers only)	
• Working with Children Check (if required for role)	



E. SELECTION CRITERIA

Essential:

- Proven experience in supporting the implementation of gift in Wills strategy
- Proven experience in developing strong relationships with internal and external stakeholders.
- Demonstrated high level fundraising skills including the ability to identify opportunities Demonstrated strategic planning and project management skills
- Ability to network and develop effective working relationships
- High levels of computer literacy with a minimum requirement of Microsoft Outlook, Word and Excel and confident in learning CRM

Knowledge of Wills and Estates administration

Desirable:

- Previous experience working at a not-for-profit

F. APPROVAL

Manager's Name:	Natasha Duncan
Approval date	March 2018