



Fundraising (Gift in Wills) Coordinator – Part Time 22.8hr

Strategic Marketing and Fundraising

Role Purpose

- **The key purpose of this role is** to support the drive to grow revenue for the Gift in Wills/ Future Planning team, that help raise sustainable fundraising to benefit both services and research of the MS entities.
- **Responsibility** for providing coordination and support in the execution of the Gift in Wills program, assisting with implementing key strategy developments and elevating our profile to all stakeholders.
- **Key role in the engagement** and stewardship of Confirmed and probable benefactors, helping the team to confirm the viability of the current living pipeline and attending to enquiries and lead generation objectives. Telephone calls to warm audiences (leads generated) and families will be a requirement of the role.
- **Assisting with data entry and maintaining current systems and processes** with current content, especially when conducting surveys and “mail” responses and subsequent action (donor journeys/ engagement plans and other items that may arise).
- Once systems are underway, this will be key to **helping with stewardship of benefactors and probable benefactors (by telephone/ online and by correspondence) helping to implement donor experiences** such as customised journeys and maintaining donor engagement to a high level of satisfaction (with team support and all training provided). This might involve helping with planning events or social media etc.
- Ideally this role will be one of the **main drivers as “steward and nurture”** MS Callistemon League members such as identify leads/ online and mail lead generation, telephone calls, handwriting birthday/ seasonal cards and thank you notes on correspondence, our “Living Pipeline” leads in line with communication preferences.
- **Take on specific projects, on an “as needed basis”** –this might include “In Memory Giving” platforms, or may be refreshing content to align with our refreshed brand and overreaching fundraising proposition.
- **Being the on point contact for our some of our internal stakeholders** (IG Team/ Accounts/ Other teams) to ensure cooperation and smooth running of the Gift in Will team, this may include payments and data leads.

Organisation

MS Plus Limited, commonly known as “MS Plus”, is the go-to provider of information, advice, and support for people affected by multiple sclerosis and other neurological conditions. We’re a combined entity of the ACT, NSW, Victoria, and Tasmania with over 60 years’ insight into how to live well with progressive neurological conditions.

Our program within the organisation:

We offer vital support and services for people living with multiple sclerosis while the search for a cure continues. We are here so no one has to face MS alone. Our Future Planning/ Gift in Will team has been performing solidly for over 20 years receiving gift in Will “legacy gifts”, with exceptional results showing since 2015 since actively surveying our donors and stewarding our leads.

In June 2021 MS Plus extended its offering by becoming the national fundraising arm for medical research into better treatments and ultimately a cure for MS for “MS Australia” and its former entity “MS Research Australia”, the Gift in Wills team now services bequests and legacy giving for all 3 entities.

We honour research gifts and those aimed for services in our new proposition “help fast-track a cure for MS and ensure we provide care until we’re there”. Any research funding collected by MS Australia then goes back to MS Australia, which distributes it to fund scientific research projects according to its agreed research strategy.

Funds for MS Plus help fund vital programs and services such as Plus Connect, Advisor services, Peer Support programs, MS Education (including wellness events, family camps, podcasts, carers support, health professional programs), MS Ambassador Program, NDIS Engagement and helping the Wellness Centres plus more.

Our Aspiration

The home of comprehensive support for neurological conditions

Our Purpose

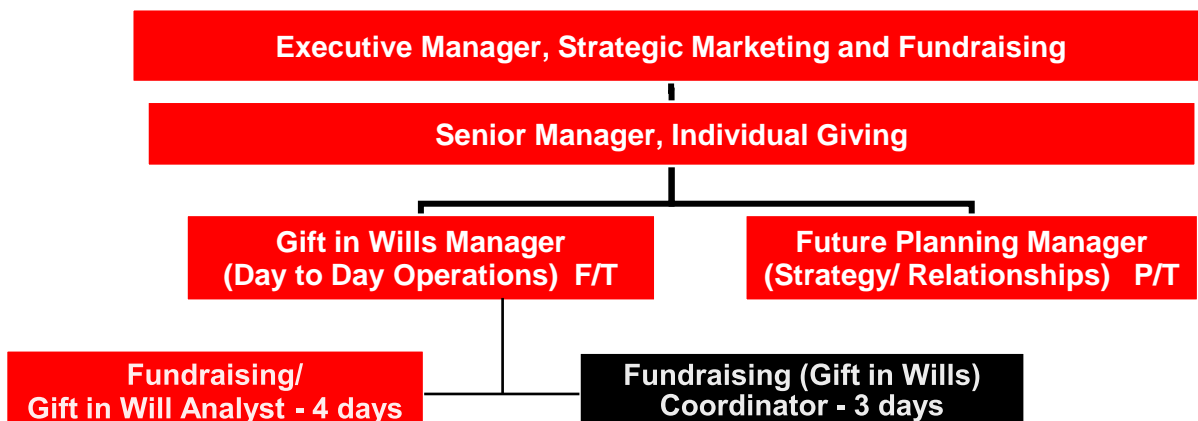
Together on the journey to break down barriers, achieve goals and live well

Our Values

- Empowerment** We show respect for the rights of others and listen to the voices of our clients in making decisions. We encourage and enable others to attain goals and achieve them, and we aim for the best outcomes for our stakeholders.
- Community** We respect difference in all its forms and welcome diverse members of our community. We work collaboratively, creating stronger solutions together. We build trust by engaging with stakeholders to share understanding, and we participate in networks, partnerships, and community events to advance MS Plus' objectives.
- Expertise** We commit to ongoing learning to maintain contemporary knowledge in our respective fields of practice. We share our knowledge with stakeholders to empower and enable them. We develop and model effective leadership in the sector and our organisation.
- Creativity** We establish ways to capture, communicate and implement innovative ideas and practices. We see emerging opportunities and problems and take proactive steps to adapt accordingly.
- Spirited** We encourage initiative and look for ways to continuously improve. We show resilience in the face of setbacks, overcome obstacles, and learn from experience.

Position

- Operating Budget** Competitive rate offered – to be discussed further depending on experience x 22.8hr work week) NOTE: Access Pay benefits will be offered.
- Position FTE (Full time/ Part time)** Part time - 22.8 Hours a week – this can be 3 standard days – with Wednesday's highly desired (or over 4-5 days with shorter hours)
The Role may be Hybrid (as per MS Plus policies).
Generally a standard work day *may* occur between 8-6pm (usually either 8-4pm or 9-5pm most common) to suit the team but times to be agreed upon.
- Location/s – currently this is** 80 Betty Cuthbert Drive, Lidcombe - as new premises are being built also on Betty Cuthbert Drive and anticipated for the new building to be finished by Nov/Dec 2024 (and working from then in the "new" Lidcombe office).
- Applicant to be aware of move:**
Hybrid arrangements (on an approved ratio of office to WFH as per Policy will be available – eg 3day a week role is 1 day WFH capacity).



Key Responsibilities of this role

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Strategic / Organisational Leadership Responsibilities

- Assist in implementing the research and services 'gifts in Wills' programs in line with their key strategies to ensure the continued development and stewardship of a robust gift in Wills pipeline.
- Helping with ongoing improvements to gifts in Wills fundraising operations, this may include processes or activities and primarily responsible for ensuring a satisfying donor experience.
- Helping to plan and service workload to ensure resources are used effectively and forward plan time allocation.
- Record and provide accurate summary and analysis of bequest activity including in CRM databases such as Salesforce, Raisers Edge as well as aligning with data of external providers Bequest Assist and Market Smart.

Operational Leadership / Administrative Responsibilities

- Manage the appropriate stewardship of confirmed benefactors and those in the living Pipeline eg cards/ notes.
- Confident communicator, willingness and confident to speak to donors, warm leads and families of benefactors.
- Regularly update Salesforce with bequest activity and is the key contact with our Estate management consultant Bequest Assist, ensuring data integrity is key (responsibility shared overall with the team).
- Responsible for ensuring all bequest activity is accurately reflected in Salesforce and receipts are promptly issued. Being the on point contact for accounts or Bequest Assist as needed.
- Follow up with the communication journeys with executors, law firms and next-of-kin of our late bequestors
- Take shared responsibility for managing and responding to inbound inquiries including telephone contact.
- Ensure colleagues have all relevant information required to perform their duties and established standards are maintained.
- Contribute to the refinement of the donor stewardship plan, ideally tis means handwritten notes/ cards and sharing ideas and information gathered during any telephone calls to help a better donor experience (and key data).
- Takes shared responsibility of the "In Memory Giving" program (online in and by mail).
- Executes the EDM program via Campaign Monitor (if needed)
- Works with volunteers to enhance the program's output (ideally to help be on point on a Wednesday)

People Leadership and Relationship Management

- Works collaboratively with the donor and fundraising teams to support the donor journey and execute the strategy to convert existing supporters to benefactors.
- Works with external partners and suppliers to ensure maximum value for money is achieved.
- Works with the IT department to realise the full potential of the database.

Key Contacts to the Fundraising (Gift in Will) Coordinator role

- **Gift in Wills Manager (Operations)** – Rebecca (Bec) is Full Time and implements day to day operations objections as such the Fundraising (Gift in Will) Coordinators will report into this role.
- **Fundraising/ Gift in Will Analyst** – David (is currently 4 days a week) and fellow a team member that will be working closely with this role, this role has a focus on data and some tasks may be shared/ overlapped.
- **The Gift in Will team** works alongside Laura, the **Future Planning Manager** (Strategy and Relationship focus), this is a Part Time role (3 days a week) and joint objectives will be worked towards to as a shared team.
- Fundraising/ Future Planning team also utilizes volunteers (currently on hold pending the move but will resume)
- Individual Giving Team members – the team consists of 8 members (including 4 in the Gift in Will Team), helping with all individual fundraising goals such as appeals, acquisitions, mid/ major giving and regular giving.
- **Senior Manager Individual Giving** – Elizabeth (Liz) leads the Individual Giving team.
- MS Plus Executive Manager and other senior managers
- MS Plus Communications team, Finance team, IT Team as well
- as Agencies and vendors (as mentioned we use Bequest Assist and Market Smart and we may add to this with agencies that can assist in other lead generation/ digital service providers to help further our program).

Competencies needed for success in this role

Revenue Raising

Builds positive and mutually rewarding relationships with prospects, donors and benefactors, as well as their families. Acts to secure revenue opportunities as an administrator of those relationships, in an ethical way.

Responsible for receipting and reconciliation of estate income (using internal information, together with Bequest Assist forecasting and notification processes).

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Sustainability

Manages financial and relationship risks day-to-day basis. Seeks to build bonds between prospects and the organisation to manage risk over time and documents interactions carefully to ensure continuity.

Reflective Practice

Use reflective and evidence-based practice models in the development of relationships.

Knowledge of client and customer outcomes

Demonstrates understanding of donor and bequestor decision drivers and creates common ground on which trusted, long-term 'gifts in will's relationships can be secured.

Taking responsibility

Takes responsibility for outcomes, working with other staff, and accepts joint responsibility for actions of others within a team or working group.

Problem-solving

Applies agreed on systems to address problems and supports colleagues to take proactive approaches to problem-solving. The team is planning on raising its digital presence and this might include project responsibilities with service providers (agents/ website/ digital experts including SEO analysts as well as internal relationships.)

Program development and implementation

Manages programmes to timelines and budgets, achieves goals and objectives, and seeks opportunities.

Achieving results

Understands roles and responsibilities of the Gift in Will Team and manages own programme of work to achieve objectives. Obtains necessary support from stakeholders through timely and supportive influencing of others.

Creativity and Innovation

Seeks to initiate innovative ideas and practices, in consultation with the Gift in Will Manager. The team is planning on raising its digital presence and this might include project responsibilities with service providers (agents/ website/ digital experts including SEO analysts as well as internal relationships.)

Technology

Mandatory understanding of basic office systems and associated CRM platforms (Salesforce experience is mandatory and Raiser's Edge is also desirable). The role will utilise digital lead generation tools, this will include EDMs so Campaign Monitor (or the equivalent) skills is desirable, other lead generation tools may be needed (training can be provided).

Shared vision

Celebrates the achievement of outcomes that contribute to the organisation's purpose. Role models behaviours in line with MS Plus values and proactively but sensitively addresses behaviour of colleagues that do not align with those values.

Team dynamic

Manages or influences team dynamic, supporting productive working relationships and work-life balance.

Communication

Provides informed, meaningful, and relevant messages when communicating with all stakeholders.

Knowledge, Experience and Personal Attributes needed for success in this role

Qualifications

- Essential**
- Relevant tertiary qualifications – marketing, business, fundraising, social work, comms, etc.
- Preferred**
- Fundraising qualifications desirable
 - Has or willing to undertake in-service courses on 'Gifts in Will' fundraising (will be offered if not) (Periodic training via Bequest Assist and Include a Charity will also be offered and encouraged)

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Knowledge and Experience

- Knowledge of the Australian fundraising environment, ideally with 'Gift in Wills' experience
 - Experience in donor development and stewardship programs, (or a background in account management) and/or willingness to learn
 - Intermediate to advanced skills in Microsoft Office suite.
 - **Essential**
 - Strong skills with Salesforce (the Gift in Will team uses this for database management, donor engagement and forecasting including by our external agents Bequest Assist)
 - Experience in stakeholder management and/or project management due to lead generation plans
 - **Strong interpersonal skills for making phone calls and talking to donors**
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- In addition to your solid Salesforce skills, experience using Raiser's Edge, Campaign Monitor, Excel and other CRM database management systems is highly desirable or willingness to learn.
 - **Preferred**
 - Knowledge of the basics of wills and probate processes (Monthly external training will be offered)
 - Basic events management skills is desirable

Personal Attributes

- A passion for developing donor relationships, with the ability to both, build rapport and deal sensitively with people when discussing 'end of life' issues, including over the phone.
- Self-motivated with the ability to work autonomously and proactively solve problems.
- Highly organised with the ability to prioritise tasks.
- Excellent interpersonal, verbal, and written communication skills.
- Ability to work in a small team with a willingness to assist across all areas of the organisation.
- Confident and emotionally intelligent

Licence / Registration or Accreditation

- Working with Childrens check (may be needed.)

Other

Employment Screening

Appointments within MS Plus are subject to the satisfactory completion of a police check (All) a Working with Vulnerable People check (WWVP) ACT & Tasmania, an NDIS National Worker Screening Check (NDISWC), and/or a Working with Children check (WWCC) where applicable to the role; plus character/performance reference checks. In some roles, you may not be able to commence work or continuing working if the required screening employment checks have not been completed/cleared.

Appointees whose role requires an NDISWC and/or a WWCC must provide a successful/cleared check if they already have one, or apply for one on appointment. Costs associated with these checks are the responsibility of the appointee.

All appointments are subject to the disclosure of any relevant employment history of formal disciplinary action for improper or unprofessional conduct taken by current or previous employers or any other integrity body within or outside Australia.

Employees must provide:

- Right to work in Australia documentation.
- An International Police Check if they have lived overseas for longer than 12 months in the last 10 years.

Required Screening Checks

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| <input checked="" type="checkbox"/> Police Check | <input type="checkbox"/> NDISWC |
| <input type="checkbox"/> WWVP (ACT/TAS) | <input type="checkbox"/> WWCC |

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