

POSITION DESCRIPTION GIFTS IN WILLS COORDINATOR

OVERVIEW

Program:	Fundraising
Reports to:	Relationships Manager
Supervise:	Volunteers where required
Date of Last Review:	September 2020
Classification:	Social and Community Services Employee Level 4 Sacred Heart Mission Enterprise Agreement 2018 or subsequent Agreements
Victorian Portable Long Service Benefits Scheme	This role has been deemed eligible to participate in Scheme

ORGANISATION CONTEXT

Sacred Heart Mission (SHM) works with people whose capacity to participate fully in community life is affected by deep, persistent disadvantage and social exclusion. Since opening our doors in 1982, the Mission has been providing a range of innovative, relationship-based service responses which enable people to overcome disadvantage and realise their full potential. As a trauma informed organisation, our shared recognition of the impact of trauma informs and guides all of our interactions with the people who access our services.

SHM is an Equal Opportunity Employer and an Environmental Sustainability driven organisation. We provide equal employment opportunities to all employees without regard to race, colour, religion, gender, national origin, age or disability. We ensure staff and volunteers operate from fit for purpose facilities that adopt green building design and practices.

SHM has a number of staff committees across the organisation committed to championing best practice in these areas. Our EEO groups lead by example to break down the barriers to inclusion and to foster a diverse workplace where people are free from discrimination and disadvantage and are treated with respect and dignity. Our Green team has set targets for developing SHM's environmental profile as a sustainable organisation and as a leader in the sector.

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VISION

Our vision is of an inclusive, fair and compassionate community, which enables people to overcome disadvantage and realise their full potential.

MISSION

Our mission is to build people's capacity to participate more fully in community life, by addressing the underlying causes of deep, persistent disadvantage and social exclusion.

We do this by:

- Ensuring access to the necessities of food, clothing, housing, health care and specialised services.
- Listening, understanding and responding to people in a holistic, caring, and respectful way, so they can take control of their lives.
- Delivering accessible, responsive, evidence informed and innovative services.
- Welcoming people in the spirit of social justice, co-operation and partnership to create better communities.
- Engaging sector partners, researchers, philanthropy, business, government and the broader community, to contribute their time, expertise and resources.

PROGRAM INFORMATION

The Fundraising team manages all events, relationships with donors, fundraising appeals, community fundraising activities, donations to the Mission, bequests and corporate relationships.

The team is integral to the Mission, as it generates much needed funds to support operational activity that otherwise would not be funded.

The team is led by the Fundraising Manager who reports to the General Manager Business Development.

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PURPOSE OF THE POSITION

Reporting to the Relationship Manager, the Gifts in Wills Coordinator delivers Sacred Heart Mission's Bequest Program. This new role within the Fundraising team, supervised by the Relationship Manager, is responsible for retaining current bequest relationships and building new ones, while promoting gifts in Wills through our annual donor communications and activities.

KEY RESPONSIBILITIES

Accountability	Major Activities
Gifts in Wills	<ul style="list-style-type: none">• Work with the Relationship Manager to implement the Bequest Strategy, plan activities and develop the role to deliver on SHM's 10-year strategic plan.• Coordinate and monitor bequest donor acquisition and retention campaigns.• Build relationships with a portfolio of confirmed bequest donors and plan, develop and implement stewardship strategies.• Coordinate key activities to deliver on the Bequest Strategy, including organising bequest events.• Administer the Bequest Program through Raiser's Edge and well organised hard and soft copy filing.
Relationships	<ul style="list-style-type: none">• Develop and maintain relationships with potential and existing bequest donors, using a range of communication and marketing techniques, including face to face visits.• Once established, this role will support the Relationship Manager to grow capacity within the middle donor space, creating further opportunity to grow fundraising income at SHM, while also growing your own donor pipelines.• Represent SHM professionally with law firms and with legal advisors (Solicitors, Executors)• Ensure bequest donors are welcomed and thanked appropriately e.g. phone calls, public recognition, invitations to events, special site tours, meetings with senior staff, where appropriate.

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	<ul style="list-style-type: none"> • Build strong relationships key internal stakeholders in accordance with the organisation's values and staff values. • Whenever relevant, recruit and work with volunteers to support the Bequest Program.
Communications and Media	<ul style="list-style-type: none"> • Deliver bequest donor communications and assist with other relevant donor communications as required, including hand-written, personalised notes where possible. • Support the implementation and monitoring of direct marketing campaigns to build a sustainable bequest pipeline. • Assist with identifying key target audiences for gifts in Wills, by working with the Appeals & Regular Giving Coordinator to segment the existing supporter database. • Develop new gifts in Wills collateral and ensure they are in line with the Mission's brand identity and values. • Actively seek opportunities to promote gifts in Wills in existing and new communications and media.
Financial	<ul style="list-style-type: none"> • Coordinate all Estate administration, including enquiries, notifications, gifts and receipts. • Support the Fundraising Manager to deliver regular income and expenditure reporting to the board. • Work closely with the Finance team to reconcile all gifts in Wills and ensure they are allocated correctly.
Team	<ul style="list-style-type: none"> • As a team player, support busy periods of activity across the team, especially during appeals and events. • Actively contribute to Fundraising team meetings. • Prepare well for your regular supervision meetings with the Relationship Manager. Use your time to develop personally and professionally in the role.
Health & Safety	Exercise a duty of care to work safely, taking reasonable care to protect your own health and safety and that of your fellow workers, volunteers and clients including following safe working procedures and instructions.

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RISK	All SHM staff are responsible for considering, identifying and addressing risk (the effect of uncertainty on objectives) whether positive (opportunities) and/or negative (threats).
CQI (Continuous Quality Improvement)	All SHM staff are responsible for identifying areas of the strategic plan that 'add value', and for implementing and monitoring CQI initiatives. Staff are open to new ways of doing things, respond to challenges with innovative ideas and solutions and promote a continuous quality improvement culture.
TIC (Trauma Informed Care)	All SHM staff are responsible for engaging in learning and development to integrate their understanding of and responsiveness to the impact of trauma within their work including active participation in the supervision and performance development process.

MANDATORY REQUIREMENTS

- A current Criminal Records Check
- Valid driver's license to drive in Australia

QUALIFICATIONS

Certificate IV or diploma level Tertiary qualification in Fundraising, Communications or Marketing desired.

KEY SELECTION CRITERIA

- Solid fundraising experience, preferably in a bequest, in memoriam or tribute giving role.
- Exceptional verbal and written communication skills are essential.
- Demonstrated experience in building strong donor relationships and the positive results you have achieved as a result.
- Outstanding interpersonal skills, with a demonstrated capacity to work collaboratively within teams of peers, staff and other stakeholders, as well as initiative and effective personal judgement when working alone.
- Ability to work independently is key during possible extended periods of working from home.
- Ability to manage timelines and work to set KPIs.
- Strong alignment with the values of Sacred Heart Mission.
- Experience in the use of Raisers Edge would be an advantage.

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APPROVED BY MANAGER

ACCEPTED BY STAFF MEMBER

DATE

POSITION DESCRIPTION SHOULD BE REVIEWED ANNUALLY OR WHEN POSITION CHANGES

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