



Gifts in Wills Coordinator POSITION PROFILE

PART A: POSITION DESCRIPTION

Position Title:	Gifts in Wills Coordinator	Location:	Chatswood/Hybrid
Group:	Aspect Philanthropy	Reports to:	Relationship & Philanthropy Manager

Organisation Purpose

Vision	Mission	Values
The best opportunities for people on the autism spectrum	We develop person-centred solutions which are flexible, responsive and evidence-informed with people of all ages on the autism spectrum	We are passionate about people, about being positive and about what's possible

Portfolio and Team Purpose

The newly formed Partnerships, Business Development and Autism Friendly Portfolio is home to four teams;

- Philanthropy, Relationships and Gift in Will
- Autism Friendly
- Fundraising, Mass Marketing and Supporter Services
- Strategic Partnerships

The majority of works is externally focussed with a **goal of growth; financial, reach and impact**. We aim to deliver excellent customer service to existing and new supporters, corporates and autism friendly clients. We are committed to utilising a data-led marketing approach to connect and inspire new partnerships and gifts through a wide variety of activities and initiatives. In turn this will enable Aspect achieve the vision to create the best opportunities for people on the autism spectrum.

Position Purpose

The Gifts Wills (GIW) Coordinator will provide support to the Relationship, Philanthropy and Gifts in Wills Manager to develop and expand the GIW program across the organisation. The position will assist in the development and implementation of integrated strategies to increase visibility of GIW, increase the GIW pipeline to secure future income growth, and steward the relationship with existing confirmed GIW supporters. The role will suit an individual who has a passion for making a difference. Working closely with the Fundraising team, the role contributes to increasing organisational income through gifts in Wills, enabling Aspect to continue its important work with the autism community.

Outcomes

Key Result Area:	Requirements & Expectations	Success Indicators
Grow the GIW programme	<ul style="list-style-type: none"> • Help to build and implement new GIW strategies to increase the program's revenue in mid to long term. • Understand and build upon the existing strategy and operational historic development of Aspect's GIW programme • Monitor trends and best practice in GIW fundraising to inspire growth of the program • Represent GIW at selected internal and external meetings • Be across up to date legislation and privacy requirements • Foster confidence as one of Aspect's inhouse GIW subject matter experts 	<ul style="list-style-type: none"> • Grow GIW income • Grow GIW pipeline of supporters • Strategy is delivered on-time, within scope and budget. • 12-18 month annual operational and budget plan in place
Marketing and communications growth strategy	<ul style="list-style-type: none"> • Support the implementation of a comprehensive growth strategy • Review existing GIW product and work with external agency to produce new potential concepts. • Support the development of GIW marketing collateral • Collaborate with the Individual Giving, Marketing and Finance teams. • Work with the Customer Experience team to map out the GIW supporter journey • Work with marketing team to increase awareness across all of Aspect's internal networks 	<ul style="list-style-type: none"> • Best practice GIW product successfully supporting cross channel communications • A suite of inspiring and innovative GIW marketing collateral. • Successful / innovative marketing and communication initiatives in place • Positive working relationships with different areas across Aspect

	<ul style="list-style-type: none"> Support the creation of a tailored communication plan for all potential GIW supporters. 	<ul style="list-style-type: none"> Increased support of GIW product across Aspect's staff GIW supporter journey mapped out
Stewardship of existing supporters	<ul style="list-style-type: none"> Support the management of current relationships with confirmed, intending and considering GIW supporters. Assist with moving existing supporters' up the pipeline. Clear understanding of Aspect GIW supporter profile(s) based around motivations Visual GIW supporter profiles developed Thank you calls and outbound engagements calls to current supporters Implement and track the supporter journey for all existing supporters. Build a program of GIW supporter events to further engage committed and potential supporters. 	<ul style="list-style-type: none"> Current GIW supporters are well stewarded and have excellent relationships with GIW team. GIW supporters are moved up the pipeline successfully from considering to confirmed. GIW supporter profiles in place Excellent customer service to supporters 3 successful GIW events per annum
Supporter maintenance	<ul style="list-style-type: none"> Maintain up to date supporter information on the database which includes all emails, phone calls, meetings, event invitations. 	<ul style="list-style-type: none"> Database completely up to date with GIW supporter information
Estate management and administration	<ul style="list-style-type: none"> Support GIW Manager to ensure the effective transfer of GIW left to Aspect. Manage relationships with executors, solicitors, next of kin and other charities where there are shared interests. Proactively follow-up Estates that have complex requirements. Keep all key stakeholders informed on expected timings (to best of knowledge) 	<ul style="list-style-type: none"> Effective transfer to Aspect in a timely manner. All GIW administration requirements are met All third party e.g. solicitor's requirements within expected timeframes

Budget KPI's and reporting	<ul style="list-style-type: none"> • Report on GIW key metrics on a monthly basis • Forecast GIW pipeline growth and income 	<ul style="list-style-type: none"> • KPI's produced monthly and on time. • Ensure the GIW matrix is kept up to date and optimised to guide the programme
Work Health and Safety	<p>It is a requirement for all staff to</p> <ul style="list-style-type: none"> ○ Ensure they meet all the inherent health requirements of the role. ○ Take reasonable care for own health and safety. ○ Comply, so far as the worker is reasonably able, with any reasonable instruction that is given by the person conducting the business or undertaking to allow the person to comply with legislative requirements. ○ Report unsafe conditions or practices, and make suggestions to their manager on improving work, health & safety at Aspect. ○ Exercise duty of care in the health, safety and welfare of students and ensure they are treated with dignity and respect <ul style="list-style-type: none"> • Participate in the staff consultation process about work health & safety matters • Understand and adhere to Aspect's Code of Conduct 	<ul style="list-style-type: none"> • Demonstrated personal responsibility and commitment to safe working practices. • Hazards, issues or risks are reported and appropriately acted upon. • Work, Health & Safety matters are raised as part of regular meetings.

PART B: POSITION CRITERIA

Capabilities	Analytical	Ability to extract and interpret information from multiple sources and in varying formats
	Oral and Written Communication	Proven ability in presenting and expressing ideas effectively, clearly and persuasively in a variety of styles in order to meet the requirements of the funders and the organisation
	Planning and Organisation	Demonstrated project management skills and the ability to manage more than one project at a time to meet multiple deadlines

	Managing relationships	Exceptional relationship management skills, including the ability to inspire supporters
	Personal effectiveness	Exceptional interpersonal skills including the ability to work independently and as a member of a team, maturity, attention to detail and a strong ability to empathise
Knowledge and experience	<ul style="list-style-type: none"> • 3 + years' experience in communicating with customers and/or supporters in the not for profit sector • Familiarity with the principles of fundraising and marketing • A passion for delivering exceptional supporter experiences including making outbound phone calls. • Strong oral and written communication skills • Confidence in presenting to and negotiating with all levels of business and the public • A demonstrated record of information gathering • Logical mind with attention to detail • The ability to build a good rapport with people from all walks of life • Excellent time management skills and ability to work to tight deadlines • Competent PC skills including Microsoft Office Suite, Adobe and CRM 	
Qualifications	<ul style="list-style-type: none"> • Relevant qualifications and/or experience in fundraising, marketing, communications or a related field. 	
Job requirements (essential)	<ul style="list-style-type: none"> • Ability to work some evenings and weekends • Empathy for people with a disability and their families/carers and older people 	
Job requirements (desirable)	<ul style="list-style-type: none"> • Knowledge of The Raiser's Edge database or similar an advantage 	

Functional capacity requirements	<p>Note: Frequency refers to an approximate percentage of time in a typical shift or period on duty: Rarely: Up to 7% Occasionally: 8% to 33% Often: 34% to 66% Continuously: More than 66%</p> <p>Requirement</p> <p>Resilience to time pressure/workload</p> <p>Sitting</p> <p>Standing, Walking</p> <p>Pulling, pushing, lifting <5kg, reaching, carrying</p> <p>Fine motor skills – keyboarding, writing</p>	<p>Occasionally</p> <p>Continuously</p> <p>Occasionally</p> <p>Occasionally</p> <p>Continuously</p> <p>Occasionally</p>
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PART C: APPROVED BY

Position Approved by: _____ (Date) _____

PART D: ACKNOWLEDGEMENT OF INCUMBENT

I have read and understood the requirements of the position

Name: _____ (Date) _____