

JOB TITLE:	Gifts in Wills –Relationship Specialist
DEPARTMENT:	Fundraising
JOB HOLDER:	To be appointed
REPORTS TO:	Senior Fundraising Manager – Gifts in Wills and Community Fundraising

JOB PURPOSE

The Gifts in Wills Relationship Specialist plays a vital role in driving future revenue by fostering and maintaining strong relationships with confirmed, intending, and prospective Gifts in Wills donors. While employing a mass marketing approach for broader relationship management, the specialist also manages a personalized portfolio of donors, ensuring a tailored stewardship and engagement strategy.

Key responsibilities include overseeing donor stewardship, engagement, and estate administration, along with managing estate-related reporting and other administrative tasks. Additionally, this role supports the Senior Fundraising Manager – Gifts in Wills and Community in developing and executing the Gifts in Wills strategy, contributing to both team and donor engagement initiatives.

DIMENSIONS

Financial:

Responsible for meeting an annual revenue budget. In 2025 this budget is \$16 million

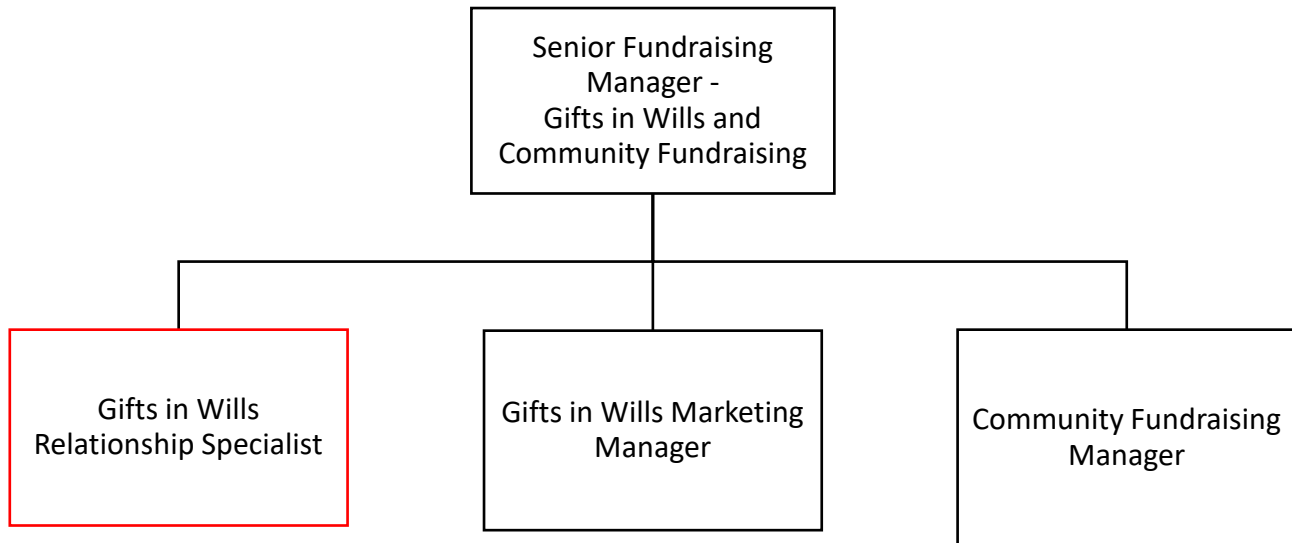
Staff:

None

Other:

Collaborate with all fundraising teams at MSF, including international colleagues and teams to further fundraising goals and the mission.

ORGANISATIONAL STRUCTURE



CONTEXT

- The Gifts in Wills Relationship Specialist works in the Community and Gifts in Wills team, part of MSF's broader Fundraising team.
- This team is responsible for the development and implementation of integrated strategies to increase visibility of Gifts in Wills to MSF, increase the donor pipeline to secure future revenue growth through gifts in wills and steward the relationship with existing confirmed supporters and intenders. The team are also accountable for estate management of realised gifts left to MSFA and MSFNZ in wills.
- The Gifts in Wills Relationship Specialist will have a focus on implementing stewardship and engagement strategies with supporters in the Gifts in Wills pipeline (including enquiries, intenders, and confirmed and reconfirmed supporters), applying a high level of mass and personalised donor care to develop highly engaged and lasting relationships.
- The Gifts in Wills Relationship Specialist will also support the Gifts in Wills Marketing Manager on the execution of mass marketing and tactical media to generate bequests and grow the Gift in Will donor pipeline

ACCOUNTABILITIES

- Working with the Senior Fundraising Manager- Gifts in Wills and Community Fundraising, to develop a Relationship strategy for Australian and NZ markets.
- Implement the Gifts in Wills Relationship strategy, which includes mass and personalised engagement activities via telephone, digital, face-to-face (1:1 meetings, events) and other channels of communication, which results in highly engaged and lasting relationships with confirmed and reconfirmed donors.
- Create inspiring materials, communications, and events for stewarding the relationship with Gifts in Wills supporters.
- Ongoing support of estate administration, liaising with external parties as needed.
- Supporting the Gifts in Wills Marketing Manager on mass marketing activities, and content development
- Reporting on progress against agreed plans and toward targets.
- Strong collaboration with team members, other teams, and departments, including the broader Engagement team, working closely with Communications and Digital to ensure seamless integration and a unified approach.
- Compliance with all relevant fundraising regulations, MSFA Editorial standards, and ethical practices.

KEY PERFORMANCE INDICATORS

- Gifts in Wills Relationship Strategy Developed
- Relationship Strategy implemented.
- Meet agreed retention and Re Confirmation targets
- Meet the required touch point targets for Mass and identified portfolio of donors as per Relationship Management strategy.
- Estates administration supported to a timely and high standard
- Provide support to Gifts in Wills Manager to ensure effective mass acquisition and cultivation strategies are implemented and growth in the donor pipeline.
- Look at opportunities to increase lifetime value with successful stewardship
- Reporting is clear, accurate, and completed to an agreed standard.
- Projects are managed and completed in a timely manner and agreed standard
- The Gifts in Wills Specialist integrates well across the department and the rest of the organisation.
- Strong supplier and key stakeholder management
- Activities are in line with legislation and standards

CHALLENGE & CREATIVITY / DECISION-MAKING

- Creating and implementing an engagement and stewardship strategy for confirmed and reconfirmed donors, as well as working with new enquiries, that can be applied on mass, but also allows for opportunities for personalised communications.
- Identifying, collaborating, and progressing opportunities to further engage GiW donors in order to increase their giving, including the development (or collaboration) of high-quality special events, materials, and bespoke experiences, which build donors' understanding, engagement, and financial support for MSF
- Identifying and managing a portfolio of personalised relationships with select donors where they can effectively increase the total value of giving to the organisation.
- Data on current and prospective GiW donors are accurately collected and recorded on the CRM which will assist in optimising and informing the strategy.

KNOWLEDGE, SKILLS & EXPERIENCE

- Demonstrated Fundraising experience, ideally in Gifts in Wills and estate administration
- Experience and having the confidence to speak with donors
- Experience in building relationships with donors or customers that is focused on retention
- Experience with working with a number of stakeholders, delivering complex projects to deadline.
- An understanding of broad fundraising principles and industry practices.
- Demonstrated ability to build and maintain strong relationships with internal and external stakeholders.
- Ability to understand and interpret data to inform activities.
- Ability to communicate and manage the goals of the organisation in conjunction with supporters, to obtain the best outcome for both, always within the missions, values and strategy of MSF.
- Great team working ethic.
- Strong communication and interpersonal skills, with the ability to articulate complex ideas in a clear and concise manner.
- A dynamic and results-driven self-starter;
- Outstanding organisation and administrative skills, including ability to manage multiple relationships and projects simultaneously.

COMPETENCIES

- Lead by example. In MSF- Australia, the following five values form the foundations of our culture: **Transparency, Respect, Understanding of Diversity, Stepping In and CollaboraTion**. As a leader, your behaviours and actions are expected to consistently reinforce these values

DATE:	
Signed: (Job Holder)	
Signed: (Manager / Director)	