

## Position Description

<b>Position</b>	<b>Gifts in Wills Specialist (Stewardship)</b>
<b>Reporting to</b>	<b>Fundraising and Philanthropy Manager</b>
<b>Division</b>	Strategic Fundraising
<b>FTE</b>	Part-time (0.8FTE)
<b>Location</b>	Blackburn or Lidcombe (hybrid working)

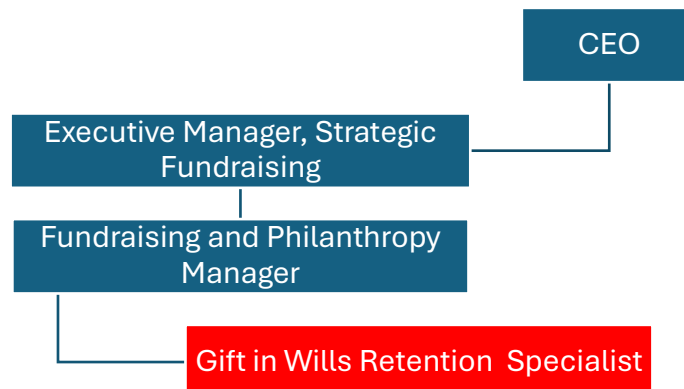
### Organisation

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.

### Role Purpose

The Gifts in Wills (GIW) Specialist (Stewardship) is responsible for retaining and nurturing confirmed pledgers through tailored stewardship, ensuring they feel valued, connected, and confident in their decision. This hands-on role focuses exclusively on stewardship, retention, and estate management, and involves delivering highly personalised donor experiences, recognition initiatives, and meaningful engagement opportunities that strengthen each pledger's connection to MS Plus and its mission. With an emphasis on creating and applying data-driven insights, the Specialist will refine stewardship initiatives and manage estate administration to ensure donor wishes are honoured and legacy gifts are realised. This role collaborates closely with the Gifts in Wills (GIW) Specialist (Acquisition), who is responsible for awareness, lead generation, and pledge conversion.

### Team structure



### Key Responsibilities

- Develop and deliver comprehensive stewardship strategies to engage, nurture, and retain confirmed Gifts in Wills pledgers, ensuring accurate processes and documentation are maintained.
- Provide highly personalised donor care through tailored communications, events, and recognition initiatives that celebrate pledgers and reinforce their connection to MS Plus.
- Manage the Gifts in Wills recognition program, ensuring benefactors are acknowledged appropriately and recognition materials are delivered in a timely and meaningful way.
- Lead the administration of realised bequests by liaising with executors, solicitors, and trustee companies, ensuring compliance, accurate record-keeping, and that donor wishes are honoured.

- Collaborate with Finance, Legal, and Fundraising colleagues to track and report on estate progress and income, maintaining transparency and accountability.
- Partner with the Gifts in Wills Acquisition Specialist to ensure a seamless donor journey from pledge confirmation through to long-term stewardship and legacy realisation.

Key focus area	Success factors
<b>Stewardship &amp; Donor Engagement</b>	<p><i>Building and nurturing meaningful relationships with confirmed pledgers to ensure they feel valued, recognised, and connected.</i></p> <ul style="list-style-type: none"> <li>• Lead and implement stewardship plans for confirmed pledgers, ensuring ongoing engagement and satisfaction.</li> <li>• Deliver personalised donor care through tailored communications, visits, and appreciation activities to strengthen relationships and secure commitments.</li> <li>• Design and coordinate donor appreciation and recognition events, delivering meaningful and memorable experiences to strengthen relationships.</li> <li>• Work closely with the GIW Acquisition Specialist to produce compelling communications across multiple channels to engage and inform supporters.</li> <li>• Contribute to the execution of broader GIW campaigns (direct mail, digital, telemarketing), ensuring alignment with stewardship goals.</li> </ul>
Key focus area	Success factors
<b>Estate Management</b>	<p><i>Overseeing estate administration and ensuring pledgers and estates are appropriately recognised, with donor wishes honoured.</i></p> <ul style="list-style-type: none"> <li>• Provide assistance with estate administration, liaising with executors, solicitors, and trustee companies to ensure proper management of bequest gifts.</li> <li>• Ensure donor wishes are honoured and legacy gifts are realised in a timely, compliant manner.</li> <li>• Develop and manage recognition initiatives for pledgers and estates, celebrating and honouring their legacy contributions.</li> <li>• Maintain accurate and up-to-date CRM records of estate progress, donor recognition, and related documentation.</li> </ul>
Key focus area	Success factors
<b>Collaboration &amp; Reporting</b>	<p><i>Partnering across teams and external stakeholders to ensure a seamless donor journey, high program standards, and data-driven improvements.</i></p> <ul style="list-style-type: none"> <li>• Partner with the Fundraising team to convert leads into confirmed pledgers, ensuring a seamless donor journey.</li> <li>• Work closely with the GIW Acquisition Specialist to integrate acquisition and stewardship efforts.</li> <li>• Foster strong relationships with external agencies and service providers to maintain program quality.</li> <li>• Conduct regular analysis and reporting on stewardship and estate activities, identifying opportunities for improvement.</li> </ul>

	<ul style="list-style-type: none"> <li>Collaborate with IT, Finance, and the Fundraising Manager to optimise database use and track outcomes.</li> </ul>
Qualifications/Work Experience	
<b>Essential</b>	<ul style="list-style-type: none"> <li>Minimum 3 years' experience in fundraising, donor stewardship, major gifts, or legacy programs.</li> <li>Proven experience in values-based donor conversations, demonstrating high empathy, sensitivity, and discretion.</li> <li>High-level interpersonal and relationship management skills with the ability to build trust and navigate sensitive situations.</li> <li>Strong understanding of probate and estate administration processes (or willingness to learn).</li> <li>Excellent written communication skills, including drafting sensitive correspondence to donors, families, and executors.</li> <li>Proficiency in CRM systems (e.g., Raiser's Edge, Salesforce) for donor and estate management.</li> <li>Exceptional organisational skills and attention to detail, with ability to manage sensitive and confidential information.</li> </ul>
<b>Desirable</b>	<ul style="list-style-type: none"> <li>Tertiary qualifications in Marketing, Communications, Business or related field.</li> <li>Experience working with or within the health/disability or social impact sector.</li> <li>Event management experience for donor appreciation and stewardship.</li> <li>Experience in donor recognition and memorial programs.</li> </ul>
Knowledge and Key Selection Criteria	
<b>Essential</b>	<ul style="list-style-type: none"> <li>Understanding of GIW within the broader fundraising mix and supporter lifecycle.</li> <li>Familiarity with fundraising best practices, compliance requirements, and relevant privacy codes, regulations, and ethical standards applicable to Gifts in Wills and donor engagement.</li> <li>Strategic expertise in donor retention methodologies and best practices.</li> <li>Ability to engage, influence and support donors with empathy and professionalism.</li> <li>Proficiency in budget management and meticulous record-keeping.</li> <li>Exceptional written and verbal communication skills.</li> <li>Data literacy, with understanding of donor management systems and reporting.</li> </ul>
<b>Desirable</b>	<ul style="list-style-type: none"> <li>Knowledge of legacy giving best practice in the Australian NFP sector.</li> <li>High emotional intelligence and sound judgment, demonstrating ability to navigate complex interpersonal dynamics.</li> <li>Proficiency in donor research techniques to uncover key insights and inform strategy.</li> </ul>

Key Competencies	
Key Focus Area	Demonstrated competency
<b>Ethics</b>	Observes professional boundaries and standards and assists others with ethical dilemmas
<b>Interpersonal Skills</b>	Exhibiting empathy, active listening, and emotional intelligence in interactions to foster strong, positive relationships with donors and team members.
<b>Written and Oral Communication</b>	Demonstrating strong communication skills to clearly convey the organisation's mission and impact to donors and stakeholders, encouraging alignment with organisational goals.
<b>Consumer Outcomes</b>	Ensuring meaningful donor engagement and satisfaction, fostering increased retention and support for the organisation's mission.
<b>Conflict Management</b>	Recognises and navigates differences of opinion or sensitive situations that may arise with donors, families, or executors, working towards respectful resolution that honours donor wishes and preserves positive relationships.
<b>Advocacy</b>	Advocates for donors by ensuring their legacy intentions are respected and fulfilled, while acting as a brand ambassador for MS Plus to strengthen trust and long-term connection.
Personal Attributes	
<b>Client Focused</b>	<p><b><i>Empathy, Wisdom, Purposeful</i></b></p> <p>The incumbent must demonstrate professional excellence by actively and empathetically addressing donors' needs and interests. The success of the program depends on building and nurturing intentional, long-term relationships with donors to represent the organisation's values and objectives.</p>
<b>Collaborative</b>	<p><b><i>Listening, Influencing, Negotiating</i></b></p> <p>Collaboration with colleagues across various fundraising functions is essential to enhancing the lifetime value of donors. This includes working closely with the events and retail teams to integrate multichannel fundraising strategies. Additionally, collaborating with service delivery teams to create compelling cases for support is crucial for achieving program success.</p>
<b>Creative and Innovative</b>	<p><b><i>Learning, Thinking, Acting</i></b></p> <p>As an internal expert on gift-in-wills Stewardship, the incumbent will remain at the forefront of sector developments, best practices, systems, and regulations. This involves staying current on innovations, including advancements in technology, and applying them to continuously improve processes and outcomes.</p>
<b>Analytical</b>	<p><b><i>Exploring, Analysing, Data-Driven</i></b></p> <p>With a focus on data analytics and prospect research, the incumbent will bring both empirical insights and personalised knowledge to the program. This analytical approach ensures the program's strategy is informed and grounded in data-driven decision-making.</p>
<b>Determined</b>	<p><b><i>Committed, Persistent, Clear-Sighted</i></b></p>

Through the cultivation of strong donor relationships, the incumbent will demonstrate unwavering resolve, knowing when to initiate or support a solicitation at the ideal moment to maximise impact.

### 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, 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, work may not be attended 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.

#### Required screening

<input checked="" type="checkbox"/>	Police Check	<input type="checkbox"/>	International Police Check
<input type="checkbox"/>	WWVP (ACT/TAS)	<input checked="" type="checkbox"/>	WWCC
<input checked="" type="checkbox"/>	Right to work in Australia	<input checked="" type="checkbox"/>	NDISWC
<input type="checkbox"/>	Relevant vaccination records	<input type="checkbox"/>	Other

### Acknowledgment

I accept this position description as detailed above and understand that it may be reviewed regularly and may need to be amended occasionally due to variations in responsibilities and organisational requirements.

I have been made aware of how to access MS Plus policies and procedures for future reference.

I am aware that should I be in any doubt about the interpretation of a policy or procedure I should consult my immediate Manager or a People Culture Quality representative.

*Signed*

*Employee*

*Date*