

## POSITION DESCRIPTION

<u>Position Title:</u>	Grants and Fundraising Coordinator
<u>Classification:</u>	Social and Community Services Employee – Level 4
<u>Department/Program:</u>	Inclusion DesignLab
<u>Report to:</u>	Head of Policy, research and Advocacy
<u>Location:</u>	67 Sutherland Road, Armadale
<u>Issued:</u>	October 2024

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### POSITION OBJECTIVE

The Grants & Fundraising Co-ordinator performs a key role in coordinating all aspects of the organisation's grants and fundraising activities, being responsible for acquiring, engaging, managing, and retaining major supporters, donors and bequests.

They are responsible for finding funding opportunities that align with the organisation's services and mission and writing polished proposals to secure financial support. A key part of this role involves preparing and managing all reporting, acquittals and regulatory expectations of funding partners and stakeholders.

As part of a small, dynamic team, the Grants & Fundraising Co-ordinator will work closely with the Head of Policy, Research and Advocacy to develop, maintain, and grow relationships across a variety of stakeholders and funders

This position will also champion the recreation of Inclusion Melbourne's Bequest program and hold responsibility for acquiring, engaging, managing, and retaining major donors and bequestors.

### SALARY

The classification applicable to the position is Level 4.3 under the Social, Community, Home Care & Disability Services Industry Award 2010.

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## Our Values

### Integrity

*"To consistently act on sound moral principles"*

**We will act with integrity by:**

- Being respectful
- Doing what we say we'll do and being open about how we do it
- Being honest about what we can and cannot achieve
- Acting in a manner that is deserving of your trust
- Having skilled, competent and professional employees

### Potential

*"The inherent ability or capacity for growth"*

**We will see the potential of all persons by:**

- Believing that everyone has the potential to keep achieving more
- Ensuring that everyone has equal opportunities for development
- Understanding that overcoming obstacles is a necessary part of the journey to success

### Individuality

*"A single person regarded as a unique personality, distinguished from others by special qualities"*

**We will embrace individuality by:**

- Acknowledging uniqueness and accepting differences in a non-judgemental manner
- Using a person-centred approach to meet the unique needs of each person
- Supporting people to make choices that build the lives they want
- Working with people in unique and personalised ways
- Respecting individual and family customs, practices, beliefs, traditions and heritage

### Relationships

*"A significant connection existing between people and communities"*

**We will foster relationships by:**

- Being honest with each other
- Supporting and encouraging each other
- Connecting people with their community and nurturing new relationships
- Working together to solve problems
- Listening to each other to achieve mutual understanding
- Strongly believing that together people create better lives

## KEY RESULT AREA – Grants Coordination and Administration

Key Responsibilities	Duties
<p>Identify relevant grant opportunities that can assist the organisation to achieve its mission and strategic objectives.</p>	<ul style="list-style-type: none"> <li>• Development and maintenance of annual grants calendar.</li> <li>• Ensure funders are appropriately recognised by the organisation as per the conditions of funding.</li> <li>• Maintain up to date databases with relevant information.</li> <li>• Maintain frequent communication and positive working relationships with internal and external grant-related stakeholders.</li> <li>• Ensure resource planning and procurement, including formal attainment of assistance from stakeholders, volunteers, other staff and management as required.</li> <li>• Ensure all relevant opportunities are filtered, assessed and disseminated for further consideration by relevant departments in accordance with their predetermined funding and areas of focus:</li> <li>• Provide regular internal updates to leadership where required and prepare grant activity summaries for board reports.</li> <li>• Record reporting timelines and acquittal requirements into the organisation's schedule of alerts and reminders and produce high-quality progress and final acquittal reports in accordance with funder requirements.</li> <li>• Co-ordinate the generation of progress reports and acquittals and any other obligations to funding bodies.</li> <li>• Assist in servicing corporate sponsorship obligations and preparing and managing tender materials for industry sector partnerships.</li> </ul>
<p>Develop high quality, targeted grant submissions and responses to identified funding opportunities across government, corporate foundations and philanthropic bodies.</p>	<ul style="list-style-type: none"> <li>• Liaise with key stakeholders to obtain relevant information required for grant application</li> <li>• Coordinate and collate all relevant information for grant application</li> <li>• Prepare grant application keeping Inclusion Melbourne Values</li> </ul>
<p>Coordinate grant implementation with key IM Stakeholders.</p>	<ul style="list-style-type: none"> <li>• Once the grant is received, liaise with Project Coordinator and Head of Policy, Advocacy and Research to ensure the successful grant is then managed by the project team for implementation.</li> <li>• Liaise with other relevant stakeholders to ensure work identified in the grant is completed.</li> </ul>

	<ul style="list-style-type: none"> <li>• Monitor timelines for grant delivery and ensure funding received as required</li> <li>• Provide regular feedback regarding grant applications and opportunities and keep grant tracking tools up to date.</li> <li>• Ensure funders are appropriately recognized by the organisation as per the conditions of funding.</li> <li>• Maintain up to date databases with relevant information.</li> <li>• Liaise with the Head of Finance and other relevant managers in the development of project budgets and proposals.</li> <li>• Build, strengthen and utilise relationships with funding bodies, including corporate and philanthropic entities.</li> </ul>
Co-ordinate grant funding administration according to grant and funding specifications.	<ul style="list-style-type: none"> <li>• Provide regular feedback regarding grant applications and opportunities and keep grant tracking tools updated.</li> <li>• Coordinate the generation of progress reports and acquittals and any other obligations to funding bodies.</li> <li>• Ensure reports and acquittals are delivered to funders.</li> </ul>
Monitor timelines and budgets for grants. Co-ordinate grant and funding administration according to grant and funder specifications.	<ul style="list-style-type: none"> <li>• Using tracking tools to ensure that all grants are meeting budget requirements.</li> <li>• Raise and manage any instances where a grant is not meeting budget requirements.</li> </ul>

**KEY RESULT AREA – Bequests and Fundraising Coordination and Administration**

Key Responsibilities	Duties
<p>Develop and implement a new bequest and major gift strategy and program, including literature and accompanying documents and developing new processes or literature where needed.</p> <p>Identifying relevant bequest and fundraising opportunities that can assist the organisation to achieve its mission and strategic objectives.</p>	<ul style="list-style-type: none"> <li>• Targeted fundraising through the identification and pursuit of funding opportunities from individuals, corporations, foundations, trusts, and philanthropists.</li> <li>• Develop and maintain relationships with donors and bequestors.</li> <li>• Responsibility for a variety of tasks related to the identification and stewarding of bequest donors.</li> <li>• Program management through the coordination of a pipeline of bequestors and implementing a stewardship program.</li> <li>• Regular stewardship through personal communications to current and prospective bequestors, including regular promotion of the bequest program.</li> <li>• Assisting with fundraising events and other engagement activities.</li> <li>• Maintain accurate records with prompt updates.</li> </ul>

	<ul style="list-style-type: none"> <li>• Effective estate administration: following up with probate lawyers and updating bequest income data.</li> <li>• Provide regular updates/reports regarding bequests received.</li> <li>• Ensure donors are appropriately recognised by the organisation as per conditions.</li> <li>• Maintain a database with relevant information.</li> <li>• Liaise with the Head of Finance and other relevant managers about funds received.</li> <li>• High quality proposals developed.</li> <li>• Efficient responses to all requests for updates regarding fundraising and bequest summaries for board reports.</li> <li>• All reporting requirements are developed in accordance with funder requirements</li> <li>• Timely review of fundraising opportunities to determine decisions to proceed</li> <li>• All records are well developed, managed and up to date.</li> </ul>
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**KEY RESULT AREA – Organisation/Customer Service**

Key Responsibilities	Duties
Values of Inclusion Melbourne are incorporated into daily work practices.	<ul style="list-style-type: none"> <li>• Demonstrates and upholds IM Values</li> </ul>
Excellent customer service to all stakeholders.	<ul style="list-style-type: none"> <li>• Customer Service (internal &amp; external)</li> </ul>
Positive customer feedback.	<ul style="list-style-type: none"> <li>• Support key business functions of the organisation ensuring a positive public image of Inclusion Melbourne is presented.</li> </ul>
All communications are positive and effective.	<ul style="list-style-type: none"> <li>• Ensure effective communications with all stakeholders.</li> <li>• Displays a commitment to open communication.</li> </ul>

**KEY RESULT AREA – OUR TEAM**

Key Responsibilities	Duties
Staff Engagement	<ul style="list-style-type: none"> <li>• Performance review conducted in accordance with the relevant policy.</li> </ul>
Occupational Health & Safety	<ul style="list-style-type: none"> <li>• This is often a standard inclusion in PD's.</li> </ul>

Teamwork	<ul style="list-style-type: none"> <li>• Attends and participates in relevant meetings.</li> <li>• Contributes to the development of the administration team ensuring communication is positive and effective.</li> <li>• Sets and keeps high standards of teamwork</li> <li>• Openly supports and respects diversity within the team.</li> <li>• Works with team members to assist in planning and in achievement of team timeline, goals and outcomes.</li> <li>• Proactively supports other team members.</li> </ul>
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### ORGANISATIONAL RELATIONSHIPS

<b>Reports to:</b>	Head of Policy, Research and Advocacy
<b>Supervision:</b>	N/A
<b>Internal Liaisons:</b>	All Inclusion Melbourne departments and liaisons as appropriate
<b>External Liaisons:</b>	<b>Funding bodies, gov departments, philanthropic bodies and donors</b>

### ACCOUNTABILITY, EXTENT OF AUTHORITY, JUDGEMENT & DECISION MAKING

The Grants and Fundraising Co-ordinator is accountable for all tasks allocated to the role, by the Head of Policy, Research and Advocacy. Assistance is available when required.

### EXTENT OF AUTHORITY, JUDGEMENT & DECISION MAKING

Work outcomes will be collaboratively determined with and supervised by the Head of Policy, Research and Advocacy.

To achieve the duties and responsibilities of the position, the Grants and Fundraising Co-ordinator is expected to:

- Exercise a degree of autonomy within their area of responsibility
- Undertake a variety of tasks of a specialised and/or detailed nature under general direction from the Head of Policy, Research and Advocacy
- Make decisions and exercise professional judgement in appropriate situations
- Provide specialist technical advice from a grants, donor, and funder relationship perspective and make recommendations to the Head of Policy, Research and Advocacy and the CEO
- Use initiative to identify, or predict an issue that may arise and assess or think through resolution options using sound problem-solving skills
- Not commit the organisation to any obligations beyond the scope of the duties
- Alert management of any potential issue or crisis
- Exercise judgement and initiative where policies and procedures are not clearly articulated.

## KEY SELECTION CRITERIA:

### **Essential:**

- A genuine interest in, and commitment to Inclusion Melbourne's vision, mission, and values of integrity, potential, individuality, and relationships and the organisation's strategic direction.
- A relevant degree with relevant experience; or other formal qualifications with specialist skills sufficient to perform the role e.g. experience in submission writing, submission sourcing, pipeline development and planning, project management and communications, fundraising and bequest program development.
- A minimum of 2 years' experience in grant writing.
- A strong understanding of stewardship principles as they relate to bequests and major gifts.
- Experience in developing and maintaining relationships with a high degree of maturity and empathy.
- Excellent communication and stewardship skills, including the ability to write, plan, prepare and deliver proposals and submission documents.
- Sound knowledge of the disability and philanthropic sectors.
- An ability to monitor and interpret grant guidelines and a variety of funding forms.
- Proven teamwork skills and the ability to work collaboratively or to undertake independent activities where necessary.
- Ability to work independently to identify, cultivate, raise funds from and manage relationships with an agreed portfolio of charitable trusts and foundations, individuals and bequests.
- High level of interpersonal skills and demonstrated success in working effectively with a diverse range of people, including philanthropic groups, project partners, community, business, donors and government stakeholders.
- Excellent administrative and organisational skills.
- Demonstrated fundraising or (equivalent administrative) experience including an understanding of the implementation and administration of trusts and foundations programs.

### **Desirable:**

- Bachelor's degree qualification in Disability, Social Science, Communications, Project Management or related/adjacent areas
- Experience in a disability support, community, charitable, advocacy or philanthropic organisation

### **NDIS Worker Screening Check**

It is a condition of your engagement with Inclusion Melbourne that your employment is subject to clearance through the NDIS Worker Screening Check. It is mandatory for incumbents of risk-assessed roles to have full clearance prior to commencing with Inclusion Melbourne.

### **Equal Opportunity & Diversity**

All appointments will be made in conformance with the spirit and intent of the Equal Opportunity and Anti-Discrimination legislation. Inclusion Melbourne is committed to maintaining a diverse workforce that reflects the diverse needs of the people we support. Inclusion Melbourne is an equal opportunity employer and encourages applications from people with a disability, and from culturally and linguistically diverse backgrounds including Aboriginal and Torres Strait Islanders, and the LGBTIQ community.

I have read, understand and accept this position description, and agree to fulfil the requirements of this role to the best of my ability. I understand that the position description may be modified from time to time to suit organisational requirements.

I agree to notify my supervisor immediately of any change in my capacity to meet the requirements. I also agree to inform my supervisor if any of the following requirements change:

- Driver license status (if applicable)
- NDIS worker screening check
- Compliance with Inclusion Melbourne's Vaccination Policy
- The capacity to fulfil the inherent requirements of the role

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Employee's Name:

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Employee's Signature

Date:    /    /