



# Position Description

## Head of Gifts in Wills

Functional department:	Revenue
Reports to:	National Manager, Revenue
Position type:	People Leader
Effective date:	June 2026

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## Position purpose

The focus of the role is to lead, inspire and mentor a high-performing, integrated team that builds meaningful, lifelong relationships with supporters who choose to leave a gift in their Will. We are looking for a strong, values-led leader who can bring clarity, care and momentum to this important program, supporting the team to deliver thoughtful donor experiences and grow confidence in future giving.

By bringing together the relationship function, estate management and Gifts in Wills marketing, the role ensures donors and their families are supported with care, respect and gratitude at every stage of their journey. As one of the organisation's most important long-term revenue streams, the Gifts in Wills program plays a critical role in sustaining the Heart Foundation's future impact and helping more Australians live longer, healthier lives.

## Key accountabilities

Key areas of accountability to ensure our success:

1. Lead the development, delivery and monitoring of an integrated Gifts in Wills strategy that brings together marketing, donor relationship management and estate administration to grow sustainable long-term income and strengthen the supporter experience.
2. Provide strong, values-led leadership to the Gifts in Wills team, creating a positive, collaborative and high-performing culture with clear priorities, shared goals and accountability for outcomes.
3. Champion a donor-centred approach across the program, ensuring supporters, families and estate representatives are engaged with care, respect and gratitude throughout their journey, from early interest through to confirmed gift intentions and estate administration.
4. Lead Gifts in Wills marketing activity to grow awareness, generate qualified leads and build a strong future pipeline of supporters who may consider leaving a gift in their Will.
5. Lead the relationship management approach to support and nurture supporters through the Gifts in Wills pipeline, moving leads from prospect to considerer to confirmed gift intention through thoughtful, personalised and timely engagement.
6. Oversee estate management activity to ensure realised gifts are administered in a timely, accurate and respectful way, balancing effective income realisation with care for families, executors and legal representatives.



7. Develop annual operational plans, budgets, forecasts, KPIs and performance measures that support pipeline growth, income delivery, campaign effectiveness, relationship conversion and the strategic importance of Gifts in Wills as a critical revenue stream.
8. Oversee program performance and prepare clear reporting for internal stakeholders, including budget management, reforecasting, return on investment, campaign performance, pipeline movement, relationship management and estate administration outcomes.
9. Provide strategic upward leadership to the National Manager, Revenue by offering clear advice on program performance, emerging risks, opportunities and decisions required to strengthen governance, support future growth and enable timely oversight.
10. Act as an active member of the Revenue Leadership Team, contributing to the overall delivery, performance and continuous improvement of the Revenue division, including the development of best practice fundraising approaches and a collaborative, high-performing team culture.
11. Lead in accordance with the Heart Foundation's values and consistently role model the agreed organisational behaviours, including a commitment to community and volunteer engagement, diversity and inclusion.
12. Undertake other duties or responsibilities, as directed, within the scope of this role and consistent with skills, qualifications and experience, as may be required from time to time.

## Position requirements

### Qualifications, skills, knowledge and experience

Tertiary qualifications in a related discipline or extensive experience in fundraising.

- Demonstrated experience leading a Gifts in Wills, philanthropy, individual giving or relationship fundraising program, with a strong understanding of donor journeys, pipeline development and long-term income growth.
- Proven people leadership experience, including the ability to lead, inspire and develop a high-performing team, set clear priorities, build accountability and create a positive, collaborative culture.
- Strong understanding of donor-centred fundraising, including the ability to build meaningful supporter relationships and move leads through a pipeline from prospect to considerer to confirmed gift intention.
- Experience developing and delivering marketing, engagement or stewardship strategies that grow awareness, generate qualified leads and support sustainable revenue growth.
- Knowledge of estate administration or estate management processes, including working respectfully with families, executors, solicitors and other representatives involved in realised gifts.
- Strong commercial and financial capability, including experience with budgeting, forecasting, reforecasting, KPIs, ROI, performance reporting and income analysis.
- Well-developed strategic thinking and planning skills, with the ability to translate organisational priorities into practical operational plans and measurable outcomes.
- Strong communication, influencing and stakeholder engagement skills, including the ability to provide clear advice to senior leaders and work collaboratively across teams.
- Ability to use data, insights, sector trends and best practice benchmarks to identify opportunities, manage risks and improve donor experience and program performance.



## Our values

**Trustworthy and Accountable** – we keep our promises and take responsibility for our actions and their impact.

**Ambitious and Measured** – we set bold goals and pursue them thoughtfully, balancing aspiration with grounded thinking, patience and care.

**Informed and Aware** – we make decisions informed by the best evidence, context and a broad understanding of our environment, supporters and stakeholders.

**Collaboration and Partnership** – we work together, build strong relationships, and achieve more through teamwork and shared purpose.

**Curiosity & Humility** – we are eager to learn, open to new ideas, and value the perspectives and expertise of others.

## Organisational competencies

**Teamwork** – Fosters high performing teams within a function

**Personal effectiveness** – Role models a commitment to professional and personal development

**Drive for results** – Leads team performance to deliver operational outcomes

**Manage Relationships** – Develop and maintain stakeholder relationships

**Accountability** – Holds self and team members accountable for conduct and performance

## General commitments and expectations

**Work Health Safety:** adhere to Workplace Health and Safety requirements and comply with all Heart Foundation policies, procedures and systems.

**Flexibility and Travel:** be prepared to travel and, when necessary, undertake duties outside the standard working hours in support of the Heart Foundation initiatives. Such occasions will be planned and communicated in advance wherever possible.

**Right to Disconnect:** respect the principles of the right to disconnect, ensuring that after hours work is balanced, reasonable and limited to agreed arrangements. Employees are not expected to be engaged in work related communication outside of these agreed circumstances.

**Commitment to Organisational Goals:** play a key role in achieving our goals by focusing on your role's priorities and showing up in person when needed, while enjoying the flexibility offered through the Heart Foundation's policy.