

Position Description

Position Title: Gifts in Wills Program Manager	Date Prepared: October 2026
Position Reports To: Head of Philanthropy	Theme/Team: Philanthropy
Classification: PS 8.1	Location: 30 Royal Parade, Parkville, Vic 3052
<p>Key Relationships:</p> <p><u>Internal:</u></p> <ul style="list-style-type: none"> Florey Philanthropy Team (incl. Head of Philanthropy, Philanthropy Manager, Donor Relations Manager, Donor Relations Specialist, Donor Relations Administrator and CRM Specialist) Florey Engagement and Communications Team Florey Executive Team, Board Members and Fundraising Committee Florey Research Staff Florey Finance Team <p><u>External:</u></p> <ul style="list-style-type: none"> The Florey donors and supporters (incl. gift in Will enquirers, intending and confirmed bequestors, and their families) Prospective donors and supporters of The Florey Executors, estate administrators, solicitors and trustee companies Financial planners, wills and estates professionals and will-writing partners Fundraising Institute Australia and peer gifts in Wills networks Community groups (e.g. U3A, Rotary and Probus) Contractors and service providers 	<p>Primary Purpose:</p> <p>The Gifts in Wills Manager leads The Florey's gifts in Wills program. The role develops, delivers and evaluates the gifts in Wills strategy to grow the number of supporters who include The Florey in their Will, increase realised bequest income and build a sustainable pipeline. The Manager is the main relationship manager of gift in Will supporters and oversees the administration of estates through to realisation, working closely with all members of the Philanthropy Team to ensure that supporters are acknowledged and stewarded appropriately and records, receipting and reporting are accurate. Operating at a leadership level, the Manager reports on program performance to senior leadership and the Board and engages directly with the Executive Team, Board and Fundraising Committee. This position is primarily based in Parkville, with some inter-campus and offsite travel and after-hours events as required.</p>

Primary Responsibilities:**Gifts in Wills Strategy and Planning**

- Develop, implement and evaluate a multi-year Gifts in Wills strategy and annual operating plan, with income, pipeline and activity targets agreed with the Head of Philanthropy
- Build and manage the Gifts in Wills pipeline (enquirers, intenders and confirmed bequestors)
- Forecast bequest income and track estates in administration, working with the Finance team to support budgeting and reporting
- Benchmark program performance against sector data and best practice, and conduct an annual program evaluation to inform future strategy
- Develop and maintain the Gifts in Wills Program Guidelines and Procedures, including gift acceptance, recognition and estate administration processes

Marketing and Supporter Acquisition

- Work with the Engagement and Communications team and external suppliers to plan and deliver integrated gifts in Wills marketing across direct mail, digital, EDM, publications, events and the website, measuring key performance metrics and return on investment
- Coordinate dedicated multichannel gifts in Wills acquisition, conversion and retention campaigns, including telephone calling, tracking results and refining activity to improve response and conversion rates
- Gather and write compelling supporter, bequestor and researcher stories, and coordinate the production of promotional videos and other content for gifts in Wills marketing
- Partner with the CRM Specialist and external suppliers to use data and insights to identify and segment supporters with gift in Will propensity, such as long-term and regular givers
- Plan, deliver and present at donor and prospect engagement events, including Florey donor events, gifts in Wills information sessions, lab tours and public lectures, and participate in sector initiatives
- Engage with community groups (e.g. U3A, Rotary and Probus) through presentations and ongoing relationships to raise awareness of The Florey's research and the gifts in Wills giving option
- Build relationships with solicitors, trustee companies, financial planners and will-writing partners to promote The Florey as a gift in Wills beneficiary, ensuring correct legal name, ABN and suggested Will wording are readily available

Relationship Management and Stewardship

- Act as main relationship manager and point of contact for a portfolio of gift in Will enquirers, intenders and confirmed bequestors, using a donor-centred and ethical approach
- Convert enquirers and intenders to confirmed bequestors through personalised cultivation, including face-to-face visits and telephone conversations
- Deliver a stewardship and recognition program for confirmed bequestors
- Coordinate engagement with researchers and the Director so that bequestors remain strongly connected to The Florey's work and impact
- Respond promptly and sensitively to all gifts in Wills enquiries from supporters, their families and advisers
- Identify bequestors with capacity for lifetime or major gifts and refer them to the Head of Philanthropy and Philanthropy Partnerships team

Estate Administration

- Manage estates from notification to realisation, liaising with executors, solicitors and trustee companies and escalating complex matters (e.g. contested estates, family provision claims, restricted or unclear gifts) to the Head of Philanthropy and legal advisers

- Ensure bequest income is received, receipted and allocated in accordance with the terms of the Will and donor intent, working with the Donor Relations Specialist and Finance team
- Arrange appropriate acknowledgement of executors and families and recognition of realised bequests

Contribution to the Philanthropy Team

- In conjunction with the Head of Philanthropy, contribute to the overall philanthropy strategy and team planning at The Florey
- Engage with and influence senior leadership, including the Executive Team and Board, providing strategic advice on gifts in Wills and representing the program at a leadership level
- Work with the Philanthropy Partnerships team to support integrated approaches to supporters with both lifetime and gift in Will giving potential
- Collaborate with the Donor Relations Specialist and Donor Relations Administrator on gifts in Wills acknowledgements, mailings and supporter enquiries

Reporting and Compliance

- Maintain accurate records in Raiser's Edge and the filing system of all documentation, contact details and interactions with bequestors, executors, solicitors and other relevant parties, in line with CRM business rules and in collaboration with the CRM Specialist
- Prepare and present monthly reports on pipeline, income, forecasts and KPIs to the Head of Philanthropy, Executive Team and Fundraising Committee, and prepare Board papers and presentations on the gifts in Wills program as required
- Ensure the program complies with the Fundraising Institute Australia (FIA) Code, the Australian Privacy Principles, relevant fundraising legislation and Florey policies, handling sensitive supporter and estate information with discretion
- Related tasks as directed by the Head of Philanthropy
- Support the collective vision and mission of the Florey through open and collaborative communication that promotes positive and respectful relationships; fostering and supporting innovation within the team and broader Institute teams; and excellence in practice driven by a focus on equity, diversity, and inclusivity

Occupational Health & Safety:

- Eliminate, or otherwise reduce as far as practicable, the risks of injuries, diseases and ill health that arise as a result of Florey Institute activities through compliance with the Florey OH&S policy and procedure
- Continually incorporate and support improvement of the management of OH&S practices for Florey related activities
- Create and promote a positive and equitable workplace through awareness of issues that impact on health and wellbeing

Skills/Qualifications:

- Significant experience (typically five or more years) in fundraising within the not-for-profit sector, including demonstrated success in managing and growing a gifts in Wills program
- Proven relationship management skills, with the ability to cultivate and steward high-value supporter relationships, manage a portfolio and secure gift in Will commitments
- Track record of meeting or exceeding income, pipeline and activity targets

	<ul style="list-style-type: none">• Excellent interpersonal skills, including building rapport, establishing trust and negotiating positive outcomes with a range of internal and external stakeholders• Highly developed written and verbal communication skills, including the ability to hold sensitive conversations about Wills, death and legacy with empathy and discretion• High-level copywriting skills, with the ability to craft compelling, donor-centred stories and marketing content for print, digital and video• Demonstrated ability to develop and execute strategy, translating a multi-year program plan into practical activity, measurable targets and results• Strong analytical, problem solving and decision-making skills• High degree of proficiency in Microsoft Office (Word, Excel, PowerPoint and Outlook) and CRM databases (Raiser's Edge preferred), including managing relationships, pipelines and reporting• Ability to quickly learn and adapt to new technologies, including AI tools, to improve efficiency and program outcomes• Highly developed planning, scheduling and time management skills, with the ability to set priorities, delegate effectively and deliver multiple projects to deadline• Confident presentation skills, with the ability to present to and influence senior leadership, the Board and external audiences• A high degree of initiative and the ability to work independently and drive activity with minimal supervision• A mature and confident attitude with diplomacy, sensitivity and ability to maintain confidence <p>Other requirement: A police check for the preferred candidate is required prior to the appointment.</p>
<p>Experience/Knowledge:</p> <ul style="list-style-type: none">• Sound knowledge of the legal, financial and ethical issues relating to gifts in Wills and estate administration, including types of bequests (residuary, pecuniary and specific), the role of executors and family provision claims	

- Experience liaising with executors, solicitors and trustee companies on estate matters
- Demonstrated experience reporting to and engaging with senior leadership, boards and committees
- Knowledge of the FIA Code and privacy obligations relating to supporter information
- Experience in the medical research, health or higher education sector (desirable)
- Experience in major gifts or integrated philanthropy (lifetime and gift in Will giving) (desirable)
- Relevant tertiary qualification or fundraising qualification (e.g. FIA Certificate in Fundraising, CFRE) (desirable)
- Current driver's licence for supporter visits (desirable)

General Attributes:

- An organised individual who appreciates systems and processes, and is comfortable working in a dynamic organisation
- An individual with high emotional intelligence, empathy and critical thinking
- Strong attention to detail and a high level of accuracy with supporter and estate documentation
- Maintains a professional outlook when engaging with senior staff, supporters, families and external advisers, and conducts work that aligns with The Florey's values
- A strong team player who works collaboratively in a fast-paced environment
- Appreciation and a general understanding of medical research fundraising and the domestic scientific community

Employee Name:

Employee Signature:

Date: