

## 4 POSITION DESCRIPTION

<b>Position Title:</b>	Gifts in Wills and Donor Engagement Officer
<b>Business Unit/Department:</b>	Western Health Foundation
<b>Division:</b>	People, Culture and Communications
<b>Award/Agreement:</b>	Victorian Public Health Sector (Health and Allied Services, Managers and Administrative Workers)
<b>Classification:</b>	HS3
<b>Reports To:</b>	Senior Manager Donor Relations
<b>Direct Reports:</b>	Nil
<b>Date Prepared/Updated:</b>	23 June 2025

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Position Purpose
<p>This is a new position that will build a sustainable Gifts in Wills program by effectively prospecting, cultivating and soliciting prospects for Western Health Foundation.</p> <p>These donor engagement actions are combined with the provision of the highest levels of donor stewardship and service to maintain and develop their annual giving levels. The role will focus on soliciting Gifts in Wills from the Western Health Foundation's donor pool and the wider community through direct mail, email, telephone engagement, targeted functions, information sessions and other best practice initiatives, including digital and integrated campaigns to promote Gifts in Wills.</p> <p>The Gifts in Wills Officer has responsibility for maintaining timely and accurate records in the fundraising database of contact with donors and other external relationships, while ensuring compliance with relevant privacy and fundraising policy and legislation. The role works collaboratively with other fundraising programs and staff to optimise donor engagement and overall fundraising revenue.</p>
Business Unit Overview
<p>The Western Health Foundation is dedicated to raising funds to assist Western Health and the people of Melbourne's west. The funds raised by the Western Health Foundation are specifically targeted:</p> <ul style="list-style-type: none"> <li>• For medical equipment and patient care services and facilities at Western Health.</li> <li>• To fund research undertaken by Western Health.</li> <li>• To provide scholarships for the staff at Western Health and support staff wellbeing.</li> </ul> <p>The Foundation has a trust and is governed by the Western Health Board.</p> <p>This Foundation is led by the Director of the Western Health Foundation.</p>

### Our Vision

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The Foundation's plan focuses on growing the scale and impact of the Foundation. As part of this, we are aiming to significantly increase our fundraising goals and to expand our reach across our community, philanthropic and corporate partners. This role plays an important part in achieving that vision.

Operationally, the Foundation secures income via several channels including community engagement, corporate contracts, individual giving, direct mail appeals and broad-based acquisition campaigns, philanthropic foundations and grants, major gifts and bequests.

The Western Health Foundation fundraises for Western Health so it can provide the best care to our community.

### Key Responsibilities

1. Support the development and tracking of the Gifts in Wills pipeline, from early consideration to confirmed intention, ensuring timely movement and stewardship of prospects.

- 1.1. Maximise future Gifts in Wills revenue by increasing the number of intending Gifts in Will prospects and increasing the proportion of confirmed in Gifts in Wills prospects on our active donor base.
- 1.2. Support the creation and delivery of digital and integrated campaigns to promote Gifts in Wills, including emails, social media content and web updates
- 1.3. Produce regular plans of proposed activity for agreement with the Senior Manager Donor Relations.
- 1.4. Provide regular reports on donor stewardship, cultivation and solicitation results as requested.

#### Performance indicators:

- Gifts in Wills donor development plans implemented as agreed and approved by Senior Manager Donor Relations.
- Number of confirmed Gifts in Wills supporters increased.
- Retention, annual giving, upgrades and conversion rates tracked to inform and measure engagement.
- Donor engagement activities and outcomes (eg calls, meetings, solicitations) delivered according to schedule.
- Regular, accurate reports delivered on time.
- Demonstrated integration with other fundraising programs.
- Evidence of high-quality stewardship actions and retention practice.

2. Develop relationships with existing, new, and potential Gifts in Wills supporters

- 2.1 Respond to all requests for further information and follow up as required.
- 2.2 Encourage and inspire donors to consider leaving a gift to the WHF in their Will.
- 2.3 Engage in a structured process of converting prospects to considerers/ intenders.
- 2.4 Ask considerers/intenders for the Gifts in Wills confirmation and record on the CRM.

#### Performance Indicators:

- Stewardship strategy implemented, including personalised engagement and events or information sessions.
- Queries responded to GIW packs sent within 2 working days.
- Number of GIW solicitations made and confirmed intentions recorded.
- Retention of living confirmed GIW donors.
- Appeal and annual results achieved among living confirmed GIW donors.
- Overall donor engagement volume tracked and increasing.

3. Maintain accurate records and provide regular and consistent reports.

- 3.1. Ensure data and information from supporter contacts are recorded in Salesforce database accurately and in a timely manner.
- 3.2. Ensure compliance with all relevant legislation, WH Policies and Procedures, fundraising legislation, standards, and codes of conduct in relation to members of the public, supporters and donor communications, data collection and transfer, and gift processing.

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<p><b>Performance Indicators</b></p> <ul style="list-style-type: none"> <li>• Salesforce records kept up-to-date and reflect a true engagement activity.</li> <li>• Donor records and reports maintained accurately and securely.</li> <li>• Donor engagement actions accurately recorded in Salesforce or other CRMs.</li> <li>• Engagement activities fully comply with relevant privacy and fundraising policy and legislation.</li> <li>• Regular reporting as required.</li> </ul> <p>4. Work collaboratively with other members of the fundraising team</p> <p>4.1. Maximise revenues across income streams</p> <p>4.2. Ensure a positive and consistent supporter experience across touchpoints for GIW prospects.</p> <p>5. Ensure positive working relationships with internal and external stakeholders including:</p>
<p><b>Key Working Relationships</b></p> <p><b>Internal:</b></p> <ul style="list-style-type: none"> <li>• WHF staff</li> <li>• WHF Director</li> <li>• WH staff</li> <li>• Senior Leaders</li> <li>• Executive WH</li> </ul> <p><b>External:</b></p> <ul style="list-style-type: none"> <li>• Gifts In Wills prospects, patients and their significant others</li> <li>• Other healthcare networks and service providers</li> <li>• Other health service foundations and fundraising institutes</li> </ul>
<p><b>Selection Criteria</b></p> <p><b>Essential:</b></p> <ul style="list-style-type: none"> <li>• Demonstrated experience in donor development and solicitation</li> <li>• Empathy, discretion and emotional intelligence when engaging with donors considering a gift in will.</li> <li>• Excellent communication, collaboration, and negotiation skills, with the ability to relate sensitively to people, especially people of a senior age — especially via the phone, email and in person.</li> <li>• Strong written communication abilities</li> <li>• Competent in maintaining donor contact information for consistent and regular recording and reporting of engagement activity</li> <li>• Demonstrated ability to work productively both autonomously and as a member of a team.</li> <li>• Sound knowledge of using fundraising databases (ideally Salesforce) and MicrosoftOffice suite.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>• Gifts in Wills experience.</li> <li>• Knowledge of Bequest terminology and processes.</li> <li>• Knowledge of digital media.</li> <li>• An understanding of health services.</li> <li>• Knowledge of Ortto and Raisley, or similar platforms, advantageous.</li> </ul>
<p><b>Additional Requirements</b></p> <p>All employees are required to:</p> <ul style="list-style-type: none"> <li>• Obtain a police / criminal history check prior to employment</li> <li>• Obtain a working with children check prior to employment (if requested)</li> <li>• Obtain an Immunisation Health Clearance prior to employment</li> </ul>

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- Report to management any criminal charges or convictions you receive during your employment
- Comply with relevant Western Health clinical and administrative policies and guidelines.
- Comply with and accept responsibility for ensuring the implementation of health and safety policies and procedures
- Fully co-operate with Western Health in any action it considers necessary to maintain a working environment, which is safe, and without risk to health
- Protect confidential information from unauthorised disclosure and not use, disclose or copy confidential information except for the purpose of and to the extent necessary to perform your employment duties at Western Health
- Safeguard children and young people in our care, by ensuring that your interactions are positive and safe, and report any suspicions or concerns of abuse by any person internal or external to Western Health
- Be aware of and comply with relevant legislation: Public Administration Act 2004, Victorian Charter of Human Rights and Responsibilities Act 2006, the Victorian Occupational Health and Safety Act 2004, the Victorian Occupational Health and Safety Regulations 2017 (OHS Regulations 2017), Fair Work Act 2009 (as amended), the Privacy Act 1988 and responsibilities under s141 Health Services Act with regard to the sharing of health information, the Family Violence and Child Information Sharing Schemes, Part 5A and 6A Family Violence Protection Act 2008
- Be aware of and comply with the Code of Conduct for Victorian Public Sector Employees and other Western Health employment guidelines

### General Information

- Redeployment to other services and sites within Western Health may be required
- Employment terms and conditions are provided according to relevant award/agreement
- Western Health is an equal opportunity employer and is committed to providing for its employees a work environment which is free of harassment or discrimination. The organisation promotes diversity and awareness in the workplace
- Western Health is committed to Gender Equity
- Western Health provides support to all personnel experiencing family and domestic violence
- This position description is intended to describe the general nature and level of work that is to be performed by the person appointed to the role. It is not intended to be an exhaustive list of all responsibilities, duties and skills required. Western Health reserves the right to modify position descriptions as required. Employees will be consulted when this occurs
- Western Health is a smoke free environment

*I confirm I have read the Position Description, understand its content and agree to work in accordance with the requirements of the position.*

Employee's Name:	Click here to enter the Employee's name.		
Employee's Signature:		Date:	Click here to enter a date.

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