



## Bequests and Planned Giving Lead

Department/section:	Bequests and Planned Giving Lead
Job Type:	Fixed term, 2-year contract
Full time / Part time:	Full time or part time
Location:	Canberra, Sydney, Melbourne
Salary classification	AAS 8 \$128,477 - \$142,855 including up to 17% superannuation

### About the Australian Academy of Science

The Australian Academy of Science is a national learned academy of distinguished Australian scientists, championing science for the benefit of all. The Academy is an independent, non-government, not-for-profit organisation delivering sought after science advice that influences Australia's actions and contributes to global science.

The Academy strives to advance Australia as a nation that embraces scientific knowledge and whose people enjoy the benefits of science.

The Academy's offices are located in Canberra in the ACT, operating out of two iconic heritage listed buildings, the Shine Dome and Ian Potter House in the centre of the city.

We acknowledge and pay respect to the Traditional Owners of the lands on which the Academy Fellows and employees live and work, and to their elders, past and present.

### Our culture

The Academy reflects organisational values that earn and sustain trust. The Academy is independent, non-partisan and ethical; acts with integrity, honesty, and transparency; supports diversity and inclusion; and is respectful of sources of knowledge, such as those of First Nations people.

We offer a safe, flexible and inclusive work environment and strive to create an environment that connects, respects and values staff, investing in them to nurture and develop them as professionals.

### The position

This position is part of a Secretariat that works as a team to support activities undertaken by the Academy.

The Australian Academy of Science is seeking a Bequests and Planned Giving Lead to enhance and expand its bequest and development program. The role involves developing and implementing innovative philanthropic strategies to increase revenue in support of the Academy's mission and [Strategic Plan 2023–2028](#).

The role will work closely with the Head of Philanthropy and the Chief Executive to achieve fundraising objectives and provide input to the Academy's fundraising strategy with a particular focus on bequests and planned giving through implementation, cultivation and stewardship.

As a key member of the philanthropy team, you will have the opportunity to build on philanthropic efforts and contribute to the Academy's legacy of national scientific excellence.

Applications for part-time and flexible work arrangements will be considered. The preferred location for the role is Canberra, however applications for remote working arrangements will be considered.

## Duties and Responsibilities

Reporting to Director, Philanthropy:

1. Develop, refine and deliver a strategic bequest acquisition program to drive ongoing growth in bequest revenue aligned to the Academy's strategic plan and philanthropy KPIs.
2. Interrogate existing donor data and giving history of donors to help grow the planned giving and 'living bequests' program.
3. Identify new opportunities to increase bequests and grow awareness of the bequest program options such as planned giving, living bequests and online wills.
4. Proactively engage with the Academy's Council and Secretariat to identify and leverage relationships with Fellows and donors with the objective of identifying and growing the bequest prospect pool, ensuring a strong pipeline of bequests.
5. Develop and assist with bespoke proposals to suit donor capacity and areas of interest.
6. Increase the visibility of the Academy's philanthropy program to potential donors and stakeholders by working closely with the Communications and Outreach teams to develop, clearly articulate and promote the various options for bequests and planned giving.
7. Act as an ambassador at events and programs with internal and external stakeholders, strengthening the profile of bequests and planned giving.
8. Reporting on effectiveness of activities, evaluating the success of programs and undertaking analysis of prospect acquisition and conversion success.
9. Maintain strong relationships with internal and external stakeholders, including the Academy Council, Secretariat, Fellowship, major donors and planned giving prospects, estate executors, legal philanthropic and trustee organisations and philanthropic and fundraising industry groups.
10. Develop and agree a bequest recognition program that honours bequest donors and demonstrates the Academy's commitment to honour all forms of giving.
11. Ensure impeccable governance and administration of all estates and realised bequests to ensure timely and appropriate distribution of liaising with estate executors, legal advisers and finance teams, ensuring compliance across relevant legislation, standards and industrial instruments.
12. Manage budgets, forecast income and expenditure for bequests and planned giving activity including projections for new activity to enable effective budget controls.

## Qualifications and experience

- Proven experience of working in a bequest and/or development environment with a strong record of securing gifts.
- Relevant tertiary qualifications and/or experience in bequests, wills/estates, public relations, membership programs, fundraising and marketing.

## Selection criteria

- Proven experience in bequest program management with track record of developing and implementing successful bequest, planned giving and/or philanthropic programs.
- Excellent relationship management skills working sensitively with a portfolio of confirmed and prospective bequest donors, high net worth individuals, philanthropic donors and/or other stakeholders.
- Strong numeracy and analytical ability with experience in prospecting and pipeline development to drive donor acquisition.
- Excellent written and verbal communication and presentation skills in order to develop high quality written materials and relate effectively with a broad range of stakeholders.
- Highly developed knowledge of CRM systems.
- Sound project and budget management capability with the ability to analyse and report on results to achieve revenue and other KPIs to grow revenue from these fundraising streams.
- Highly organised, able to manage numerous projects simultaneously and good attention to detail, while also understanding the bigger picture.
- A commitment to workplace diversity, workplace participation, WHS and equity principles.