Role Description
Development & Bequest Executive

Cluster	Enterprise, Investment & Trade
Agency	Australian Museum
Division/Branch/unit	Public Affairs & Development / Strategy & Development
Classification/Grade/Band	Clerk Grade 5/6
ANZSCO Code	591115
Role Number	51004250
PCAT Code	1227221
Date of Approval	May 2023
Agency Website	https://australian.museum/

Overview

Australian Museum (AM) is located on the homelands of the Gadigal people. The AM acknowledges and pays respect to the Gadigal people as the custodians of the land, sky and waterways, paying respect to Elders past, present.

The Australian Museum (AM) operating within the NSW Department of Enterprise, Investment & Trade cluster, is the first museum in Australia and was founded in 1827. The AM provides access, engagement and scientific research to increase our understanding of natural history and culture, particularly of the Australasian region. The AM holds more than 22 million objects of biological, geological and cultural collections and develops programs, exhibitions and school and community education initiatives onsite, online and offsite.

The AM mission is: *To ignite wonder, inspire debate and drive change.*

The AM vision is: *To be a leading voice for the richness of life, the Earth and culture in Australia and the Pacific. We commit to transform the conversation around climate change, the environment and wildlife conservation; be a strong advocate for First Nations' culture; and continue to develop world-leading science, collections, exhibitions and education programs.*

For more information, visit the website.

The AM supports a diverse workforce and promotes applications from all ages and genders, Aboriginal and Torres Strait Islander peoples, culturally and linguistically diverse groups, the LGBTQIA+ community, veterans, refugees and people with disabilities

Primary purpose of the role

The Development and Bequest Executive provides advanced administrative and operational support to the ensure the smooth day-to-day operations of the Strategy & Development team. This role will also drive the Australian Museum's bequest program, which will involve the development and execution of an effective legacy giving strategy and pipeline. This role requires a high attention to detail, strong relationship management and discretion. This role sits within the Strategy & Development team and will work closely with other AM departments, donors, and the Australian Museum Foundation.

Key accountabilities

- Participates actively and coordinates activity across the Development team, providing a reliable and competent point of contact for all internal departments and external stakeholders.

- Deliver Development team business and financial administrative services including monitoring and recording budget expenditure; revenue tracking across AM and AMF accounts; complete routine financial transactions and purchasing services, report and receipt donations received; preparing and sending acknowledgement letters in conjunction with the Relationship Managers, and ensuring financial records are relevant and maintained.
- Coordinate administrative duties for the Development department such as scheduling meetings, minute taking, financial and record management, event support, travel arrangements, drafting correspondence and maintaining the CRM system Tessitura.
- Work in conjunction with the Head of Development and the Bequest Committee to establish and roll out a comprehensive bequest strategy across the Museum, including cultivation and solicitation strategies for bequest prospects. This will include updating past processes, reporting to senior leadership and the Australian Museum Foundation, support with creating short and long-term bequest strategies and stewardship plans, engaging with donors and bequest prospects in partnership with the Relationship Managers, and maintaining accurate portfolios.
- Work closely with donors to understand their interests and ambitions for their bequest, providing relevant information and support that reflects their individual need and capacity.
- Liaise and collaborate with relevant internal and external stakeholders (e.g., estate lawyers and financial services firms) to enable access and offer information to potential donors.
- Keep up-to-date and engage with industry best practice on legacy giving and fundraising at large.

Key challenges

- Delivering multiple administrative support activities and services in line with agreed standards, timeframes and milestones, given tight timeframes and the need to maintain accuracy and attention to detail.
- Building a culture of interest and participation in bequests across the Museum.
- Navigating the ever-shifting legacy giving market, ensuring key external relationships are maintained and stewarded.

Key relationships

Who	Why
Internal	
Head of Development	• Escalate issues and provide updates
Work team	• Participate in meetings, share information and provide input on issues • Collaborate on existing donor relationships to ensure stewardship is strategic and effective.
Australian Museum staff	• Respond to queries, identify needs, communicate services and redirect, escalate or resolve issues • Liaise on relevant projects and strategies that require interdepartmental support
Corporate Services & Senior Executive Leadership Team	• Liaising, providing support and presenting strategy/program updates.
External	

Who	Why
Australian Museum Foundation	• Build strong relationships with the Foundation and their networks to support the effective execution of the AMs bequest strategy. • Report where required, on key program updates and strategies.

Role dimensions

Decision making

This role has autonomy and makes decisions under their direct control and refers to the team leader decisions that require significant change to outcomes or timeframes; are likely to escalate or require submission to a higher level of management. This role is accountable for the delivery of work assignments on time and to expectations in terms of quality, deliverables and outcomes.

Reporting line

Head of Development

Direct reports

Nil

Budget/Expenditure

Budgets and expenditure are in accordance with approved Annual Budget and financial delegations and procedures subject to project type and sponsoring business unit.

Key Knowledge and Experience

- Relevant tertiary qualifications in arts, science, business, communications, marketing or a related field or equivalent work experience
- At least three years' experience working in fundraising or development (or adjacent field)
- Computer literacy in Microsoft office suite products essential

Capabilities for the role

The NSW public sector capability framework describes the capabilities (knowledge, skills and abilities) needed to perform a role. There are four main groups of capabilities: personal attributes, relationships, results and business enablers, with a fifth people management group of capabilities for roles with managerial responsibilities. These groups, combined with capabilities drawn from occupation-specific capability sets where relevant, work together to provide an understanding of the capabilities needed for the role.

The capabilities are separated into **focus capabilities** and **complementary capabilities**.

Focus capabilities

Focus capabilities are the capabilities considered the most important for effective performance of the role. These capabilities will be assessed at recruitment.

The focus capabilities for this role are shown below with a brief explanation of what each capability covers and the indicators describing the types of behaviours expected at each level.

FOCUS CAPABILITIES

Capability group/sets	Capability name	Behavioural indicators	Level
Personal Attributes	**Display Resilience and Courage** Be open and honest, prepared to express your views, and willing to accept and commit to change	• Be flexible and adaptable and respond quickly when situations change • Offer own opinion and raise challenging issues • Listen when ideas are challenged and respond appropriately • Work through challenges • Remain calm and focused in challenging situations	Intermediate
	Manage Self Show drive and motivation, an ability to self-reflect and a commitment to learning	• Adapt existing skills to new situations • Show commitment to achieving work goals • Show awareness of own strengths and areas for growth, and develop and apply new skills • Seek feedback from colleagues and stakeholders • Stay motivated when tasks become difficult	Intermediate
Relationships	**Commit to Customer Service** Provide customer-focused services in line with public sector and organisational objectives	• Focus on providing a positive customer experience • Support a customer-focused culture in the organisation • Demonstrate a thorough knowledge of the services provided and relay this knowledge to customers • Identify and respond quickly to customer needs • Consider customer service requirements and develop solutions to meet needs • Resolve complex customer issues and needs • Cooperate across work areas to improve outcomes for customers	Intermediate
Results	**Deliver Results** Achieve results through the efficient use of resources and a commitment to quality outcomes	• Seek clarification when unsure of work tasks • Complete own work tasks under guidance within set budgets, timeframes and standards • Take the initiative to progress own work • Identify resources needed to complete allocated work tasks	Intermediate
Business Enablers	**Technology** Understand and use available technologies to maximise efficiencies and effectiveness	• Demonstrate a sound understanding of technology relevant to the work unit, and identify and select the most appropriate technology for assigned tasks • Use available technology to improve individual performance and effectiveness • Make effective use of records, information and knowledge management functions and systems	Intermediate

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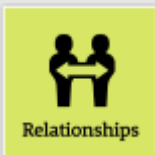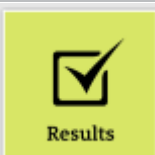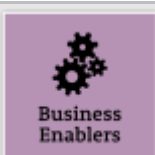
FOCUS CAPABILITIES			
Capability group/sets	**Capability name**	**Behavioural indicators**	**Level**
		• Support the implementation of systems improvement initiatives, and the introduction and roll-out of new technologies	
	Project Management Understand and apply effective planning, coordination and control methods	• Perform basic research and analysis to inform and support the achievement of project deliverables • Contribute to developing project documentation and resource estimates • Contribute to reviews of progress, outcomes and future improvements • Identify and escalate possible variances from project plans	Intermediate

Complementary capabilities

Complementary capabilities are also identified from the Capability Framework and relevant occupation-specific capability sets. They are important to identifying performance required for the role and development opportunities.

Note: capabilities listed as 'not essential' for this role are not relevant for recruitment purposes however may be relevant for future career development.

COMPLEMENTARY CAPABILITIES			
Capability group/sets	**Capability name**	**Description**	**Level**
Personal Attributes	Act with Integrity	Be ethical and professional, and uphold and promote the public sector values	Intermediate
	Value Diversity and Inclusion	Demonstrate inclusive behaviour and show respect for diverse backgrounds, experiences and perspectives	Intermediate
Relationships	Communicate Effectively	Communicate clearly, actively listen to others, and respond with understanding and respect	Intermediate
	Work Collaboratively	Collaborate with others and value their contribution	Intermediate
	Influence and Negotiate	Gain consensus and commitment from others, and resolve issues and conflicts	Intermediate
Results	Plan and Prioritise	Plan to achieve priority outcomes and respond flexibly to changing circumstances	Intermediate
	Think and Solve Problems	Think, analyse and consider the broader context to develop practical solutions	Intermediate
	Demonstrate Accountability	Be proactive and responsible for own actions, and adhere to legislation, policy and guidelines	Intermediate
Business Enablers	Finance	Understand and apply financial processes to achieve value for money and minimise financial risk	Intermediate
	Procurement and Contract Management	Understand and apply procurement processes to ensure effective purchasing and contract performance	Intermediate