

Position Description

Position Details

Position Title: **Bequest Specialist**
Reports to: Fundraising and Philanthropy Manager
Commencement Date: ASAP

Why work for the NORTH Foundation?

Working for the NORTH Foundation offers a unique and rewarding opportunity to make a meaningful difference in healthcare, research, and community well-being.

Purpose-Driven Work

- **Transform Lives:** The NORTH Foundation directly supports healthcare and medical research across the Northern Sydney Local Health District (NSLHD). Your work contributes to improving patient outcomes, advancing medical innovation, and enhancing community health.
- **Tangible Impact:** Every project and campaign creates measurable benefits for individuals, families, and the broader community. Be instrumental in growing our bequests program, ensuring donors can leave a meaningful legacy while shaping the future of healthcare.

Support a World-Class Health Network

- **Healthcare Excellence:** The NORTH Foundation is aligned with leading hospitals and institutions, including Royal North Shore and Hornsby Ku-ring-gai Hospitals, which are known for their state-of-the-art care and groundbreaking research. As a Bequest Specialist, you'll play a key role in ensuring the long-term sustainability of this world-class health network by cultivating meaningful donor relationships and inspiring legacies that make a lasting impact.

Opportunity for Growth

- **Professional Development:** The NORTH Foundation invests in its people, offering access to training, education, and career development opportunities.
- **Leadership Exposure:** You'll collaborate with healthcare leaders, researchers, and community stakeholders, expanding your professional network and influence.

Working at the NORTH Foundation is not just a job - it's a chance to be part of something bigger. Whether you're passionate about philanthropy, healthcare, or creating lasting social impact, the NORTH Foundation provides an inspiring platform to contribute to meaningful change. Join us and help make a difference!

For more information, please visit www.northfoundation.org.au

Main Purpose

The Bequest Specialist will lead the implementation and growth of the NORTH Foundation's Bequests Program to drive philanthropic giving and expand the bequest pipeline. Collaborating closely with the fundraising team and beneficiary stakeholders, the Bequest Specialist will identify funding needs, deliver bequest training for NSLHD staff, manage enquiries and referrals, and nurture relationships with grateful patients considering a bequest. Additionally, the role will involve creating impactful reporting materials and promoting the Bequests Program across various channels. A critical aspect of this position is engaging with law firms, solicitors, and executors of wills to establish and strengthen relationships that support the program's objectives. The ultimate goal is to identify, engage, and cultivate relationships with prospects, donors, grateful patients, and community members, encouraging bequests to enhance philanthropic support for the NORTH Foundation.

Key Responsibilities

Bequest Program Strategy

- Develop and execute a comprehensive bequest strategy aligned with the NORTH Foundation's strategic goals.
- Set annual engagement targets in collaboration with the Fundraising and Philanthropy Manager.
- Monitor and report on program performance, pipeline growth, and revenue forecasts.

Cultivation and Stewardship

- Build and nurture strong relationships with potential and confirmed bequestors through personalised communication, regular engagement, and meaningful recognition.
- Plan and deliver bespoke events and initiatives to engage bequest prospects, including estate planning seminars and exclusive donor gatherings.
- Develop tailored stewardship plans to honour the commitments of confirmed bequestors.

Marketing and Communications

- Collaborate with the marketing team to design and deliver impactful bequest marketing campaigns, including print, digital, and social media materials.
- Produce compelling collateral, such as brochures, case studies, and Gifts in Will and legacy giving stories, to inspire support.
- Ensure messaging aligns with the NORTH Foundation's brand and values.

Stakeholder Engagement

- Build strong partnerships with estate planning professionals, such as solicitors, financial advisors, and trustees, to raise awareness and facilitate bequest discussions.
- Actively engage with the wider NORTH Foundation team to identify prospects and ensure a seamless donor journey.

Compliance and Administration

- Ensure all bequest activities comply with legal, ethical, and regulatory requirements.
- Maintain accurate records of bequestors and prospects in the CRM.
- Liaise with executors and legal representatives to manage the receipt of bequests.

Capacity Building

- Promote a culture of legacy giving within the NSLHD.
- Stay informed of trends and best practices in bequest fundraising and incorporate learnings into the program.

Other duties as assigned by the Fundraising and Philanthropy Manager in line with the NORTH Foundation's 2025-2029 Strategic Plan.

Selection Criteria

Essential

- Demonstrated experience in bequest or legacy giving programs, fundraising, or relationship management.
- Proven ability to build and maintain meaningful relationships with donors and stakeholders.
- Exceptional interpersonal and communication skills
- High levels of empathy and compassion.
- Strong organisational and project management skills, with the ability to prioritise tasks and meet deadlines.
- High level of attention to detail and accuracy in donor record-keeping and correspondence.
- Proficiency in CRM systems and data analysis to track program performance.

Desirable

- Experience building trusted long-term partnerships and relationships.
- Experience working in a not-for-profit or philanthropic organisation.
- Experience working within the health sector or with medical/health staff.
- Experience working with a CRM Data base (like Salesforce, Raiser's Edge, etc).
- Tertiary qualifications in communications, fundraising or other relevant subject area.
- Certified Fundraising Executive Accreditation (CFRE).

Special Attributes

- Self-motivated, results-driven, and goal-oriented.
- High emotional intelligence and the ability to navigate complex stakeholder relationships.
- Strong commitment to ethical fundraising practices.
- Collaborative and adaptable team player.
- Self-confidence, enthusiasm and a "can do" attitude.
- Understand and promote NORTH Foundation Values -
INTEGRITY | COMPASSION | INNOVATION | COLLABORATION | IMPACT

Key Performance Indicators (KPIs)

- Increase in the number of confirmed bequest pledges year-over-year.
- Growth in the number of new prospects added to the bequest pipeline.
- Increase in the overall value of confirmed bequests in the pipeline.
- Number of meaningful interactions (e.g., meetings, calls, personalised correspondence) with potential and confirmed bequestors.
- Retention rate of confirmed bequestors through consistent stewardship.
- Number of donor appreciation and engagement activities (e.g., events, recognition initiatives) successfully delivered.
- Prompt and efficient management of the transfer process for bequest funds.

Remuneration & Benefits

- Competitive salary package.
- Flexible working arrangements.
- Opportunities for professional development and career growth within a dynamic organisation.

Join us in making a transformative impact on health and lasting legacies through bequests across the Northern Sydney Local Health District.

To apply, please submit your CV and a cover letter outlining your suitability for the position to hr@northfoundation.org.au.