PLANNED GIVING MANAGER

DEPARTMENT/UNIT: Advancement

FACULTY/DIVISION: Office of the Vice- Chancellor and President

CLASSIFICATION: HEW Level 8

DESIGNATED CAMPUS OR LOCATION: Clayton campus

ORGANISATIONAL CONTEXT

At Monash, work feels different. There’s a sense of belonging, from contributing to something groundbreaking – a place where great things happen. You know you’re part of something special and purposeful because, like Monash, your ambitions drive you to make change.

We have a clear purpose to deliver groundbreaking intensive research; a world-class education; a global ecosystem of enterprise – and we activate these to address some of the challenges of the age, Climate Change, Thriving Communities and Geopolitical Security.

We welcome and value difference and diversity. When you come to work, you can be yourself, be a change-maker and develop your career in exciting ways with curious, energetic, inspiring and committed people and teams driven to make an impact – just like you.

We champion an inclusive workplace culture for our staff regardless of ethnicity or cultural background. We have also worked to improve gender equality for more than 30 years. Join the pursuit of our purpose to build a better future for ourselves and our communities – #ChangeIt with us.

The Portfolio of the Vice-Chancellor and President is responsible for: high level of coordination for, and management and advice to, the Vice-Chancellor, leadership in the management and delivery of key strategic and cross portfolio initiatives, University level governance, University-wide marketing, communications and student recruitment activities, strategic communications, external relations and coordination of special events arranged on behalf of the Chancellor and the Vice-Chancellor, leadership in and development of relationships with a range of local and international stakeholders and partners, including alumni, benefactors, government, industry and strategic alliance affiliates.

The Advancement works collaboratively across the University to initiate, grow and steward strong person to person relationships with key stakeholders that support Monash University’s research
and education endeavours. This work delivers outcomes that significantly enhance the University’s profile and resources.

To fulfil our mission, Advancement oversees a range of activities including fundraising, alumni relations, communications, donor programs, government relations and community engagement activities for the University, nationally and internationally. Within ERDA, the Development team’s main goal is to mobilise unprecedented levels of philanthropic support, together with alumni and volunteer talent in support of Monash’s leading capabilities.

**POSITION PURPOSE**

The **Planned Giving Manager** is an integral member of the Planned Giving team, with responsibilities for increasing the number of individuals who choose to leave a bequest to Monash University. Working collaboratively with the Planned Giving team and with the support of Development colleagues, the wider Advancement staff and other university representatives, the Planned Giving Manager identifies and builds meaningful relationships with donors and prospects to secure planned gifts for university-wide priorities.

The Planned Giving Manager will help to develop and deliver acquisition strategies, supporting the University’s fundraising and bequest strategies, helping to advise and secure an increasing number of bequests.

They provide operational and tactical support to identify key target audiences interested in supporting Monash to leave a bequest. This role helps to manage and improve the stewardship opportunities of identified and confirmed bequestors. The role also provides strategic direction and support in the delivering of key elements of the planned giving strategy, with a large focus on cultivation strategies and supporting stewardship.

**Reporting Line:** The position reports to the Senior Planned Giving Manager under broad direction working with a degree of autonomy

**Supervisory Responsibilities:** Not applicable

**Financial Delegation:** Not applicable

**Budgetary Responsibilities:** Not applicable

**KEY RESPONSIBILITIES**

1. Increase the number of bequests to Monash University through the development and implementation of tailored planned giving strategies, appeals and programs

2. Work towards meeting personal fundraising KPIs, as well as supporting the overarching Development targets for the development team

3. Identify, cultivate and maintain relationships with an extensive network of internal and external stakeholders, including donors, alumni, network professionals and other identified supporters for the continual development of the Planned Giving program, including the stewardship and recognition of our supporters

4. Undertake a range of high-level project duties, including: Oversight to bequest related programs that contribute towards the development and implementation of cultivation strategies that increase the number of bequests to the University, working with stakeholders to scope and plan project deliverables

5. Deliver key identified areas of the planned giving implementation strategy to support the increase of bequest enquiries and relationships with confirmed bequestors

6. Develop, build and maintain strong relationships within the Development team, to actively identify new bequest and blended gift opportunities
7. Act as a bequest subject matter expert to improve project deliverables and objectives, including collaboration and support of the planned giving stewardship strategy

8. Undertake research, data analysis and management in areas of functional fundraising that support Planned Giving, including specialist advice, results, investigate options and provide recommended solutions to complex project related issues

9. Provide guidance to team members on occasion, including liaison with external Higher sector and Advancement networks, with a focus on best practise and excellence

10. Prepare and present comprehensive reports, project briefs and submissions to contribute to senior management proposals and briefs, including developing, writing, supporting and editing donor proposals as required

11. Maintain up to date specialist knowledge of the Planned Giving sector, understanding current trends and putting forward new ideas to further develop the program

12. Actively update and manage, including update records in the Advancement database to maximise accuracy of data and enable professional and coordinated relationship management

13. Other duties as directed from time to time

KEY SELECTION CRITERIA

Education/Qualifications

1. The appointee will have:
   - Postgraduate qualifications or progress towards postgraduate qualifications and extensive relevant experience; or
   - extensive experience in fundraising and relationship management expertise; or
   - an equivalent combination of relevant experience and/or education/training.

Knowledge and Skills

2. Demonstrated experience and skills in delivering a broad range of fundraising functions, including provision of strategic advice, project management, reporting and consulting, in line with an organisation’s strategic objectives

3. Demonstrated success in the implementation of tactical, bespoke and targeted fundraising strategies

4. High-level project management experience and skills with demonstrated experience in successful face to face or bequest fundraising

5. Highly developed strategic, planning and organisational skills, with experience establishing priorities, allocating resources and meeting deadlines

6. Highly-developed relationship management skills, including the ability to interact with, and gain cooperation with a variety of internal and external stakeholders, and able to meet deadlines and work under pressure in a fast-moving team environment

7. High-level research, analytical and problem-solving skills and the ability to identify and recommend solutions and strategies to challenging issues

8. Excellent interpersonal and communication skills, including experience in developing professional documentation and presenting information

9. Proven working style which is flexible, positive and collaborative with the demonstrated ability to operate independently whilst contributing to team goals and initiatives
OTHER JOB RELATED INFORMATION

- Travel to other campuses of the University may be required
- There may be a requirement to work additional hours from time to time
- There may be peak periods of work during which taking of leave may be restricted

GOVERNANCE

Monash University expects staff to appropriately balance risk and reward in a manner that is sustainable to its long-term future, contribute to a culture of honesty and integrity, and provide an environment that is safe, secure and inclusive. Ensure you are aware of and adhere to University policies relevant to the duties undertaken and the values of the University. This is a standard which the University sees as the benchmark for all of its activities in Australia and internationally.