



POSITION DESCRIPTION

University of Melbourne Advancement

Bequests Manager for Humanities, Arts and Social Sciences

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| POSITION NO | 0044542 |
| CLASSIFICATION | PSC 8 |
| SALARY | \$99,199 - \$107,370 p.a. |
| SUPERANNUATION | Employer contribution of 17% |
| WORKING HOURS | Full-time |
| BASIS OF EMPLOYMENT | Continuing |
| OTHER BENEFITS | http://about.unimelb.edu.au/careers/working/benefits |
| HOW TO APPLY | <p>Please DO NOT apply via the University website. We have engaged the consultancy Breen Recruitment to assist in this recruitment. Enquiries and applications should be directed to:</p> <p>wendy.lown@breenrecruitment.com.au using The University of Melbourne Bequests Manager HASS as your subject line.</p> <p>For a confidential discussion, call Wendy Lown on +61 414 229 827.</p> |
| CONTACT FOR ENQUIRIES ONLY | As above |

For information about working for the University of Melbourne, visit our website:
about.unimelb.edu.au/careers

Position Summary

Reporting to the Head of Bequests, the Bequests Manager for Humanities, Arts and Social Sciences will contribute to the University-wide program to solicit, secure and manage gifts in Wills and other planned gifts from alumni, staff and members of the wider University community and public, primarily for the benefit of Faculties in this area. These comprise the Faculty of Arts, Faculty of Business and Economics, Melbourne Graduate School of Education, Melbourne Law School, and the Faculty of the Victorian College of the Arts and Melbourne Conservatorium of Music. The University Library and cultural collections, the Ian Potter Museum of Art, Asialink and Melbourne University Sport are also part of the incumbent's portfolio.

The Bequest Program is currently responsible for the cultivation, solicitation and stewardship of over 700 individuals, over 380 of whom are current members of the University's Heritage Society. The program also co-ordinates the administration of all realised testamentary gifts to the University.

The primary focus of the role is relationship management. The incumbent will be expected to secure, build and manage relationships with prospective and confirmed bequestors and their intermediaries (legal and financial advisors, and family representatives), including a portfolio of key prospective and current benefactors, so as to maximise philanthropic income to the Humanities, Arts and Social Sciences Faculties and associated bodies and divisions, and the wider University over time.

The Bequests Manager for Humanities, Arts and Social Sciences will have the ability to work both independently and collaboratively within a complex environment. Working closely with the Director of Advancement for Humanities, Arts and Social Sciences, they will develop relationships with internal stakeholders including Deans, Associate Deans, Advancement, Heads of School, and colleagues across the Faculties and associated bodies in this area in order to generate long-term philanthropic support. They will need to demonstrate a strong knowledge of and affinity for bequests and other planned gifts within a higher education context, together with the ability to champion this mission both externally and internally.

1. Key Responsibilities

The Bequests Manager for Humanities, Arts and Social Sciences operates with direction from the Head of Bequests and in consultation with the Director of Advancement for Humanities, Arts and Social Sciences. They will be based in the University Advancement Office but will collaborate closely with Faculties and associated bodies and divisions in this area.

1.1 STRATEGY AND PROGRAM MANAGEMENT

- ▶ Under the direction of the Head of Bequests, contribute to the strategic development and implementation of the bequest program, and ensure that agreed personal key performance indicators are met.
- ▶ Collaborate with the Alumni Relations, Donor Relations, Engagement and Communications teams, including those located within the Humanities, Arts and Social Sciences faculties and associated bodies and Divisions, to ensure that the importance and impact of bequests to the University are well represented to internal and external audiences through all communication channels, and promoted through appropriate Advancement events across the University, including Faculty-specific events.
- ▶ Collaborate with the University-wide Donor Relations team and Advancement staff within the Humanities, Arts and Social Sciences Faculties and associated bodies and Divisions,

to ensure high quality Heritage Society and Faculty-based stewardship programs which comprehensively recognise, engage and steward those who have pledged a gift in their Will to the University, and also the families or representatives of those benefactors whose bequest has been realised.

- ▶ Work collaboratively with Advancement colleagues, and development staff in Faculties, associated bodies, Divisions and Colleges, Student Services, Scholarships and other related areas to ensure that bequests and their accompanying gift documentation are developed in a consistent way across the University.
- ▶ Work closely with the Legal Office and other relevant third parties, including solicitors, estate planners and financial planners, and trustee companies to ensure that all advice to prospective bequestors and other staff is consistent with Wills and estate law, and with University policies and procedures.

1.2 PROSPECT AND DONOR PORTFOLIO MANAGEMENT

- ▶ Manage all relationships with prospective and confirmed bequestors in a positive and purposeful way to ensure that the bequest pipeline is built and sustained, and that donor loyalty to the University is maintained and bequest pledges are ultimately fulfilled.
- ▶ Build and manage personalised relationships with up to 100 prospective and confirmed bequestors and their advisors with a view to optimising the mutual benefit to the University and the bequestor, through prioritising those relationships where the gift is likely to be imminent or of most significant value.
- ▶ Respond to all requests for bequest information in a timely manner, seeking advice from the Legal Office or other Advancement staff where necessary, and ensuring that all accompanying gift documentation is compliant with the University's Advancement policies and procedures.
- ▶ Maintain meticulous and consistent bequest records in the University's customer relationship management database (Advance) in a timely way, to facilitate an efficient, accountable program and the future retrieval of information over time.

1.3 OTHER

- ▶ As a member of the University-wide Bequest Team, actively mentor and support fellow development colleagues to develop knowledge, skills and confidence with bequests and other planned gifts.
- ▶ Ensure compliance with Occupational Health and Safety (OH&S) and Environmental Health and Safety (EH&S) responsibilities as outlined in section 5.

2. Selection Criteria

2.1 ESSENTIAL

- ▶ A tertiary qualification with substantial fundraising experience in a relationship management role, preferably gained in a higher education setting, or an equivalent combination of relevant experience and training in a senior relationship manager role with high-value clients.
- ▶ Demonstrated success in securing bequests and/or major gift support from individuals and/or their representatives, or equivalent experience in a related industry.
- ▶ Exemplary interpersonal skills, including effective listening, empathy, diplomacy and the ability to build relationships within confidential and sensitive settings.

- ▶ Highly developed organisational skills with the demonstrated ability to plan and implement complex programs and projects within agreed timeframes, together with proven success in meeting and exceeding key performance indicators.
- ▶ A high level of maturity and judgement necessary to build and sustain highly effective working relationships with senior management, academic and professional colleagues, donors and external stakeholders within the University community.
- ▶ Exemplary communication skills with demonstrable experience in communicating to a diversity of audiences from a wide range of professional, educational and cultural backgrounds, with superb attention to detail.
- ▶ A demonstrable record of operating successfully in a large and complex organisation.

2.2 DESIRABLE

- ▶ A working knowledge of Will-making and estate processes, and/or experience of working with solicitors and trustee companies.
- ▶ A strong professional network in the fundraising community with current professional development training.
- ▶ Professional skills and knowledge of industry trends and benchmarks in philanthropy, particularly bequest programs from both a national and international perspective.
- ▶ An affinity for, or experience of working in, philanthropy in the humanities, social sciences, creative arts or associated fields within Australia.

2.3 SPECIAL REQUIREMENTS

- ▶ A current full unrestricted work permit/visa for Australia is required.
- ▶ A current Driver's Licence is required.
- ▶ Willingness to travel on occasion and work flexible hours, especially attending after-hours meetings and events.

3. Job Complexity, Skills, Knowledge

3.1 LEVEL OF SUPERVISION / INDEPENDENCE

The Bequests Manager for Humanities, Arts and Social Sciences will have a high level of independent authority, while regularly reporting to the Head of Bequests and collaborating closely with the Director of Advancement for Humanities, Arts and Social Sciences and other colleagues within the Faculties and associated bodies and Divisions, the Advancement office and across the University.

The Bequests Manager for Humanities, Arts and Social Sciences operates in a highly ethical environment and needs the maturity and confidence to represent the University externally, and be an exemplar to the community and University colleagues.

The incumbent will be required to meet specified performance targets on an annual basis. Progress against target will be monitored monthly and assessed annually. Targets for the following year will be finalised following a formal review of the current year.

3.2 PROBLEM SOLVING AND JUDGEMENT

The Bequests Manager for Humanities, Arts and Social Sciences will be expected to exercise independent judgement in the management of his or her workload and the prioritisation of tasks so as to maintain key relationships and maximise financial outcomes. As Advancement is an evolving function within the University, the incumbent will need to be able to deal with high levels of organisational complexity, and be required to demonstrate sound judgment in the solving of operational challenges and management of internal and external relationships, and in the handling of confidential and sensitive bequest information.

3.3 PROFESSIONAL AND ORGANISATIONAL KNOWLEDGE

Substantial professional knowledge and experience in gifts in Wills fundraising in the Australian context, preferably as it applies in higher education, is required. The incumbent must develop a good working knowledge of the processes applicable to Wills and estate law and planning. The position requires high level conceptual, writing and presentation skills as well as outstanding interpersonal skills.

A strong affinity for – and knowledge of – the University of Melbourne is a critical success factor of the Bequests Manager for Humanities, Arts and Social Sciences' role. The incumbent will develop a strong understanding of the various academic and administrative structures and divisions of the University, and an understanding of University Advancement policies and procedures, as well as strategies and operational plans.

3.4 RESOURCE MANAGEMENT

The Bequests Manager for Humanities, Arts and Social Sciences will provide budget planning input to the Head of Bequests in order to achieve agreed goals and will work on tasks with the Bequest team members to maximise program outcomes and efficiency.

3.5 BREADTH OF THE POSITION

This position has an impact across the University and covers a wide range of functions. The Bequests Manager for Humanities, Arts and Social Sciences communicates with a wide range of stakeholders including Faculty staff, University administrative staff, other cultural divisions of the University, and peers within the philanthropic sector.

4. *Equal Opportunity, Diversity and Inclusion*

The University is an equal opportunity employer and is committed to providing a workplace free from all forms of unlawful discrimination, harassment, bullying, vilification and victimisation. The University makes decisions on employment, promotion and reward on the basis of merit.

The University is committed to all aspects of equal opportunity, diversity and inclusion in the workplace and to providing all staff, students, contractors, honorary appointees, volunteers and visitors with a safe, respectful and rewarding environment free from all forms of unlawful discrimination, harassment, vilification and victimisation. This commitment is set out in the University's People Strategy 2015-2020 and policies that address diversity and inclusion, equal employment opportunity, discrimination, sexual

harassment, bullying and appropriate workplace behaviour. All staff are required to comply with all University policies.

The University values diversity because we recognise that the differences in our people's age, race, ethnicity, culture, gender, nationality, sexual orientation, physical ability and background bring richness to our work environment. Consequently, the People Strategy sets out the strategic aim to drive diversity and inclusion across the University to create an environment where the compounding benefits of a diverse workforce are recognised as vital in our continuous desire to service for excellence and reach the targets of Growing Esteem.

5. Occupational Health and Safety (OHS)

All staff are required to take reasonable care for their own health and safety and that of other personnel who may be affected by their conduct.

OHS responsibilities applicable to positions are published at:

<http://safety.unimelb.edu.au/topics/responsibilities/>

These include general staff responsibilities and those additional responsibilities that apply for Managers and Supervisors and other Personnel.

6. Other Information

6.1 ORGANISATION UNIT

<http://advancement.unimelb.edu.au/>

The Advancement Office aims to facilitate the establishment and maintenance of mutually beneficial relationships between the University and its alumni, friends and benefactors. It is responsible for the management of programs relating to alumni and benefactors, and provides services to and works collaboratively with faculties and other central administration areas.

University of Melbourne Advancement (UoMA) is responsible for the coordination and delivery of Believe: The Campaign for the University of Melbourne, www.campaign.unimelb.edu.au

The completion of the first phase goal of raising \$500M for the Believe Campaign was publicly announced in March 2016 along with the intention to proceed with a second phase of the Campaign with revised goals of raising \$1B and actively engaging with 100,000 alumni by the end of 2021. The Campaign is the largest initiative of its kind in the Asia-Pacific region.

UoMA's Vision – Partnering for Impact

Advancement is a **catalyst** that leads to positive impact on the University, the city, the state, Australia and the world.

Mission

We do this in deep and genuine partnership with our generous alumni, supporters and academic colleagues.

To do this we will work in partnership with:

- **Academic and professional colleagues** to identify, curate, hone and present wonderful philanthropic and engagement opportunities that support our outstanding researchers, teachers and students and the spaces in which they live and work
- **Donors** to match and connect these opportunities to their passions
- **Alumni, friends and current students** to develop mutual and lifelong benefit by sharing skills, expertise and networks

Guiding Principles

- We are ‘**One Advancement**’ working together towards collective goals
- We are driven both by **university strategies** and the opportunities presented by **our supporters’ passions**
- We strive for outcomes through **strong partnerships that deliver impact** – both with university colleagues and with our community stakeholders
- We create opportunities for the university to come together with supporters to **make a difference in the world** and benefit the communities with whom we engage
- We build **enduring, purposeful relationships** that are stakeholder-centric and mutually-beneficial
- Our decision making and resource allocation are based on **expert knowledge, research insights and data**
- We recognise the impact of both **financial and non-financial contributions**
- We **operate sustainably** at both the organisational and personal levels

Foundation Values

Our work will be guided always by our Values:

- **Integrity** – we are honest, trustworthy, understanding and sincere
- **Collaboration** – we are supportive of each other and work as a team toward improved collective outcomes
- **Innovation** – we prize creativity and act with courage to progress our objectives
- **Professionalism** – we are committed, focused, accountable, respectful and proud of the work we do

Behaviours

We look to encourage the following behaviours across Advancement:

- **Prioritise** based on our strategic direction and purpose
- **Don’t go it alone** – explore and exchange expertise, knowledge and institutional memory with colleagues across Advancement
- Be willing to **innovate and test new approaches**
- Support each other to **think, speak and act courageously** in pursuit of the best outcomes
- Be **responsive and decisive** taking both personal and collective **accountability**

6.2 THE UNIVERSITY OF MELBOURNE

Established in 1853, the University of Melbourne is a leading international university with a tradition of excellence in teaching and research. The main campus in Parkville is recognised as the hub of Australia’s premier knowledge precinct comprising eight hospitals, many leading research institutes and a wide-range of knowledge-based industries. With outstanding performance in international rankings, the University is at the forefront of higher education in the Asia-Pacific region and the world.

The University employs people of outstanding calibre and offers a unique environment where staff are valued and rewarded.

Further information about working at The University of Melbourne is available at <http://about.unimelb.edu.au/careers>.

6.3 GROWING ESTEEM, THE MELBOURNE CURRICULUM AND RESEARCH AT MELBOURNE: ENSURING EXCELLENCE AND IMPACT TO 2025

Growing Esteem describes Melbourne's strategy to achieve its aspiration to be a public-spirited and internationally-engaged institution, highly regarded for making distinctive contributions to society in research and research training, learning and teaching, and engagement. <http://about.unimelb.edu.au/strategy-and-leadership>

The University is at the forefront of Australia's changing higher education system and offers a distinctive model of education known collectively as the Melbourne Curriculum. The new educational model, designed for an outstanding experience for all students, is based on six broad undergraduate programs followed by a graduate professional degree, research higher degree or entry directly into employment. The emphasis on academic breadth as well as disciplinary depth in the new degrees ensures that graduates will have the capacity to succeed in a world where knowledge boundaries are shifting and reforming to create new frontiers and challenges. In moving to the new model, the University is also aligning itself with the best of emerging European and Asian practice and well-established North American traditions.

The University's global aspirations seek to make significant contributions to major social, economic and environmental challenges. Accordingly, the University's research strategy *Research at Melbourne: Ensuring Excellence and Impact to 2025* aspires to a significant advancement in the excellence and impact of its research outputs.

<http://research.unimelb.edu.au/our-research/research-at-melbourne>

The strategy recognises that as a public-spirited, research-intensive institution of the future, the University must strive to make a tangible impact in Australia and the world, working across disciplinary and sectoral boundaries and building deeper and more substantive engagement with industry, collaborators and partners. While cultivating the fundamental enabling disciplines through investigator-driven research, the University has adopted three grand challenges aspiring to solve some of the most difficult problems facing our world in the next century. These Grand Challenges include:

- ▶ Understanding our place and purpose – The place and purpose grand challenge centres on understanding all aspects of our national identity, with a focus on Australia's 'place' in the Asia-Pacific region and the world, and on our 'purpose' or mission to improve all dimensions of the human condition through our research.
- ▶ Fostering health and wellbeing – The health and wellbeing grand challenge focuses on building the scale and breadth of our capabilities in population and global health; on harnessing our contribution to the 'convergence revolution' of biomedical and health research, bringing together the life sciences, engineering and the physical sciences; and on addressing the physical, mental and social aspects of wellbeing by looking beyond the traditional boundaries of biomedicine.
- ▶ Supporting sustainability and resilience – The sustainability and resilience grand challenge addresses the critical issues of climate change, water and food security, sustainable energy and designing resilient cities and regions. In addition to the technical aspects, this grand challenge considers the physical and social functioning of cities, connecting physical phenomena with lessons from our past, and the implications of the technical solutions for economies, living patterns and behaviours.

Essential to tackling these challenges, an outstanding faculty, high performing students, wide collaboration including internationally and deep partnerships with external parties form central components of Research at Melbourne: Ensuring Excellence and Impact to 2025.

6.4 GOVERNANCE

The Vice Chancellor is the Chief Executive Officer of the University and responsible to Council for the good management of the University.

Comprehensive information about the University of Melbourne and its governance structure is available at <http://www.unimelb.edu.au/governance>