

POSITION DESCRIPTION

POSITION DETAILS

POSITION TITLE:	Relationship Manager – Major Donors & Bequests	POSITION NUMBER:	50025557
CLASSIFICATION/LEVEL:	Higher Education Officer Level 9 (HEO9)		
MODE OF EMPLOYMENT:	Fixed-term (3 years)	TIME FRACTION:	Full-time
REMUNERATION:	This position attracts a remuneration package of \$93,249 to \$98,956 per annum which includes 17% superannuation. The salary component is \$79,700 to \$84,578 per annum. The remuneration and benefits will be <i>pro-rata</i> for part-time or fractional appointment.		
FACULTY/ADMIN UNIT:	Office of the Vice-Chancellor		
SCHOOL:	La Trobe University Foundation	COST CENTRE:	9071
CAMPUS/LOCATION:	Bundoora		
RESPONSIBLE TO:	Executive Officer, La Trobe University Foundation (LTUF)	SUPERVISOR'S POSITION NUMBER:	50009729

WORKING WITH CHILDREN CHECK REQUIRED: No

SAP ACCESS: Resource Manager of Faculty or Major Budget Area

POSITION SUMMARY

Background:

La Trobe University was established in 1964 with a distinct mission:

- To serve the community through the relevance and inclusiveness of its research and teaching;
- To make knowledge available for the benefit of all;
- To promote critical enquiry within the University and general community; and
- To produce graduates who are rounded citizens as well as trained professionals.

The La Trobe University Foundation's purpose is to enhance social investment and strengthen the financial capacity of the University through the loyalty and generosity of its supporters.

The La Trobe University Foundation (LTUF) works closely with the La Trobe community (alumni, staff, business leaders, parents, families and friends) to identify, develop and implement strategies to foster engagement and attract philanthropic and corporate support for the University's campuses, faculties, departments, schools and research institutes.

Relationship Management of Major Donors and Bequests involves superlative networking and sourcing opportunities for potential growth of donor support. This position requires a 'people' person with demonstrable skills and experience in relationship management. The role will provide an opportunity to work closely with major donors and bequest clients and provide advice and information about bequeathing to La Trobe University. In this position you will oversee a range of events for major donor and bequest clients as well as enhance the one-to-one relationships these clients have with different areas of the University.

Primary Objectives:

- Research, develop and implement individual strategies to engage potential and existing major donors in order to achieve identified targets;
- Maintain up to date and accurate data on the activities undertaken in developing relationships, including pipeline reports and funding statistics for presentation to management as required;
- Undertake a range of targeted relationship development and prospecting activities to engage potential donors within targeted segments; and
- Work with Faculties and Institutes to identify and profile research and teaching priorities that could be attractive to potential donors.

DUTIES AND RESPONSIBILITIES

The occupant of this position must be able to:

1. Develop and oversee a comprehensive, university-wide Major Donor and Bequest Operational Plan.
2. Assist with the development of a functional, appropriate and 'living' database for existing and potential major donors and bequest clients that is operated at all times within required privacy requirements.
3. Participate in face-to-face solicitations and negotiations. Establish and cultivate contacts with key influencers.
4. To work with the Executive Director, Office of the Vice-Chancellor and Executive Officer, LTUF to determine suitable budgets for major donor and bequest client activities throughout all campuses.
5. Keep up-to-date on tax laws, federal and state, affecting estate planning.
6. Provide monthly, quarterly and annual reports on activities, outcomes and campaign effectiveness; test and analyse data and initiatives to plan subsequent campaigns.
7. Contribute to the development and assessment of policies and procedures across the operational division and the university that are essential for a comprehensive major donor and bequest program. Provide advice to faculties and departments on best practise and current policy regarding major donors and bequest clients.
8. Review, on a regular basis, processes and procedures for bequest and/or specific donation disbursement so that they can be allocated according to the donor's wishes.
9. Alongside other members of the LTUF, the Relationship Manager – Major Donors & Bequests will be required to provide leadership and support to nominated groups and committees established through the LTUF to support fundraising projects and campaigns.
10. Undertake other duties and responsibilities identified by the Executive Officer, LTUF or as advised by the Executive Director, Office of the Vice-Chancellor.

SELECTION CRITERIA

Essential Requirements

1. Completion of appropriate postgraduate qualifications or progress towards postgraduate qualifications in a relevant discipline (e.g. marketing or equivalent) or an equivalent alternate combination of relevant knowledge, training or experience.

2. Demonstrated extensive experience in developing and implementing major donor and/or bequest programs, preferably in the context of successful campaigns or in the face of significant growth requirements.
3. Demonstrated experience in establishing, cultivating and maintaining long-term supportive relationships between an institution and a broad segmented donor base.
4. Excellent oral and written communication skills and strong interpersonal skills required. Demonstrated experience in handling confidential matters.
5. Computer proficiency and ability to create and interpret financial and management reports.

Desirable Attributes

1. The position is based at the Bundoora Campus with requirement to travel to other La Trobe locations or off-site locations.
2. Attendance at after hours functions and activities may be required from time to time.
3. An understanding of, or ability to acquire an understanding of, tax laws and other legal issues relating to estate planning.

APPLICATION DETAILS

For further information, or to submit applications:

**Philip Mayers or Michelle Hewitt
Silverman Dakin
Ph: 61 3 9629 6999
Email: cv@sildak.com.au**

CLOSING DATE FOR APPLICATIONS: Close of Business,

THE UNIVERSITY IS AN EQUAL OPPORTUNITY EMPLOYER

People and Culture Use Only

Date confirmed: 27/03/09

Initials: CW