

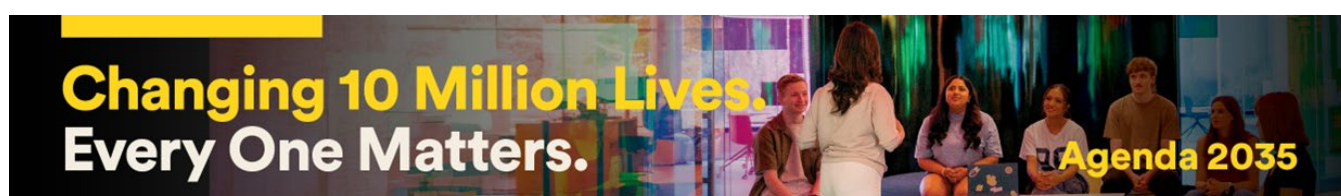
Position Description – Advancement Manager, Bequests

Updated 04/03/2026

POSITION DETAILS	
Portfolio	<i>Portfolio of the Vice-Chancellor</i>
Organisational Unit	<i>Alumni & Advancement</i>
Supervisor (Title)	<i>Senior Advancement Manager, Philanthropy & Impact</i>
Classification	<i>Higher Education Officer Level 8</i>
Employment Type	<i>Fixed-term (2 years), Full-time</i>

POSITION SUMMARY
<p>The Advancement Manager, Bequests will establish, pilot and assess the viability of the Bequest (Planned Giving) Program for Flinders University. The position will develop the program framework and test engagement and stewardship approaches and provide recommendations to inform future operational decisions.</p> <p>Alongside project delivery, the position will undertake activities, including cultivating warm, meaningful and long-term relationships between Flinders University and confirmed and prospective legators ensuring every donor feels deeply valued for their future impact.</p> <p>Working under the broad direction of the Senior Advancement Manager, Philanthropy & Impact the Advancement Manager, Bequests will collaborate with colleagues across Advancement, Alumni Relations, Legal Services and academic areas to ensure project outputs are evidence-based and aligned with the University's philanthropic priorities.</p> <p>Success requires exceptional interpersonal skills, emotional intelligence, sound judgment and the ability to engage donors sensitively and authentically.</p>

UNIVERSITY EXPECTATIONS AND VALUES
<p>All staff at Flinders are responsible for understanding their obligations and responsibilities as set out in the University's code of conduct and are expected to:</p> <ul style="list-style-type: none"> demonstrate commitment to the University's values of Integrity, Courage, Innovation and Excellence demonstrate consistent alignment with the University's strategic priorities through daily decisions, teamwork and behaviours that reinforce the strategic intent. contribute to the efficient and effective functioning of the team or work unit to meet the University's objectives. This includes demonstrating appropriate and professional workplace behaviours, providing assistance to team members, if required, and undertaking other key responsibilities or activities as directed by one's supervisor;



- promote and support an inclusive workplace culture which values diversity and embraces the principles of equal opportunity;
- perform their responsibilities in a manner which reflects and responds to continuous improvement; and
- familiarise themselves and comply with the University's *Work Health and Safety, Injury Management and Equal Opportunity* policies.

A Nationally Coordinated Criminal History Check which is satisfactory to the University will be required by Flinders University before the successful applicant can commence in this position.

KEY POSITION RESPONSIBILITIES

The Advancement Manager, Bequests is accountable for:

Bequest Program Development & Management

- Leading the strategic direction and annual planning for the University's bequest program.
- Developing, implementing and periodically review cultivation, solicitation and stewardship frameworks aligned to industry best practice (e.g., CASE, Fundraising Institute Australia), University policy and ethical standards.
- Managing a portfolio of prospective and confirmed legators, delivering personalised engagement plans that reflect donor motivations, legacy aspirations and risk considerations.
- Designing and delivering a high-touch stewardship program ensuring every confirmed legator feels connected to the University's mission. Maintain timely, empathetic and personalised communication with legators and their families.
- Identifying and managing program risks (e.g., complex estate arrangements, contested bequests, reputational considerations), ensuring appropriate governance, documentation and approvals are in place.
- Reviewing the Bequest Program's performance and provide evidence-based recommendations to determine its ongoing viability and effectiveness.

Donor Cultivation & Solicitation

- Conducting warm, values-aligned donor conversations that explore philanthropic motivations and legacy aspirations.
- Facilitating bequest confirmations and documentation in partnership with Legal Services and Alumni & Advancement Operations.
- Implementing targeted outreach campaigns to grow the bequest pipeline, including engagement events, personalised mailings, digital engagement and peer-influence programs.

Collaboration, Reporting and Other

- Collaborating with Alumni and Advancement colleagues, academic leaders, researchers and professional staff to create compelling engagement opportunities for donors.
- Maintaining accurate donor records, intentions and interactions within the CRM.
- Monitoring, analysing and reporting on the performance of the bequest program, including pipeline growth and stewardship metrics.

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- Ensuring compliance with all legal, ethical and privacy requirements (FIA Code, Australian Charities and Not-for-profits Commission guidelines).

Any other responsibilities aligned with the position level as assigned by the Supervisor and/or the University.

KEY POSITION CAPABILITIES

- Progress towards postgraduate qualifications and extensive relevant experience; extensive experience and management expertise; or an equivalent combination of experience and/or education and/or training.
- Demonstrated experience in bequest fundraising, planned giving or major gift fundraising within the higher-education or not-for-profit sector.
- High-level interpersonal skills, with the ability to build trust, navigate sensitive conversations and engage with empathy. High-level of professionalism, discretion and judgment.
- High-level written and verbal communication skills, including the ability to tailor messaging to different audiences.
- High-level organisational skills with a demonstrated ability to manage a portfolio, prioritise competing demands and maintain meticulous attention to detail.
- Proven ability to collaborate effectively with diverse internal stakeholders.
- Relevant experience using philanthropic client relationship management (e.g., Raisers Edge) to track, manage and report on planned giving programs and donor engagement activities.
- A demonstrated understanding of relevant legislation, processes and procedures related to Planned Giving Programs.
- Knowledge of estate planning, wills, trusts, charitable gifts or legal processes related to bequests. (Desirable)
- Experience in a university environment or complex institution. (Desirable)

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