

Position Description



Title	Estates Project Coordinator
Business Unit	Community and External Relations
Location	Flexible - Victoria or Tasmania
Employment type	Full Time, Maximum Term (9 month contract)
Reports to	General Manager, Community & External Relations

About Uniting

Uniting Vic.Tas (Uniting) is the community services organisation of the Uniting Church. We've been supporting people and families for over 100 years. We work alongside people of all ages in local communities in Victoria and Tasmania. Our services reach to Albury-Wodonga in the north, Mallacoota in East Gippsland, the Wimmera region in the west, and across Tasmania.

We empower children, young people and families to learn and thrive. We're there for people experiencing homelessness, drug and alcohol addiction or mental illness. We support people with disability to live the life they choose. We assist older people to maintain their independence and enjoy life. We provide opportunities to access training and meaningful employment. We're proud to welcome and support asylum seekers to our community. We work to empower people with the information, skills and tools they need to live a healthy, happy life.

As an organisation, we work in solidarity with Aboriginal and Torres Strait Islander people as Australia's First Peoples and as the traditional owners and custodians of this land. We celebrate diversity and value the lived experience of people of every ethnicity, faith, age, disability, culture, language, gender identity, sex and sexual orientation. We welcome lesbian, gay, bisexual, transgender, gender diverse and non-binary, intersex and queer (LGBTIQ+) people at our services. We pledge to provide inclusive and non-discriminatory services.

Our purpose: To inspire people, enliven communities and confront injustice

Our values: We are imaginative, respectful, compassionate and bold

1. Position purpose

This project role will support the processing of trusts, bequests and estates that are administered by the Uniting Church Synod of Victoria and Tasmania (UCA) and have Uniting or its predecessor organisations as a whole or partial beneficiary.

2. Scope

Budget: Nil

People: Nil

3. Relationships

Internal:

- Operational General Managers
- CEO
- Group Manager Business Development, Innovation and Response
- Mission and Inclusion
- Finance

External

- The Synod of the Uniting Church in Victoria and Tasmania
- Trustee companies/executors

Approved by: (position [see delegations of authority policy])	Page 1 of 3	Division:
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4. Key responsibility areas

- Service delivery**
 - Coordinate with UCA to facilitate distribution from UCA for those estates and trusts which have been identified as being for the benefit of Uniting.
 - In conjunction with UCA, identify and report operational deficiencies and/or proposed operational efficiencies in the management of estate and trust funds.
 - Liaise with Uniting Operational services in the application, distribution and assessment of estate and bequest funds
 - Keep information regarding 'estates in perpetuity' (annual income) up-to-date in the CRM and automate any program allocations (to be included in FY budget preparation)
 - Itemise all UCA estates revenue for FY23 as per estate and relevant program allocation in budget plan so it is available for the budget planning process.
 - Document relevant and ongoing trust/estate policies, protocols and procedures to include UCA Property Trust and operational requirements. Advise External and Fundraising Partnerships Team regarding administration of estates

- Administration and finance**
 - Provide monthly progress reports of estate and bequest income identified and accessed
 - Monitor ongoing and new income from UCA Estates
 - Ensure all interactions are recorded in the appropriate CRM(s)

- People and teams**
 - Undertake regular supervision and performance review with line manager regarding the use of approved estate and bequest funds, providing feedback to promote collaborative working relationships
 - Promote and maintain a positive, respectful and enthusiastic work environment

- Legal requirements**
 - Ensure all legal, funder and statutory requirements pertaining to the position are met

- Personal accountability**
 - Compliance with Uniting's values, code of conduct, policies and procedures and relevant government legislation and standards where relevant.
 - Cooperate with strategies to actively ensure the safety, protection and well-being of children who come into association with us.
 - Ensure appropriate use of resources.
 - Work collaboratively with Uniting employees and external stakeholders in accordance with Uniting's values and professional standards of behaviour.
 - Actively participate in initiatives to maintain, build upon and promote a positive and collaborative workplace.
 - Identify opportunities to integrate and work collaboratively across teams.
 - Take reasonable care for your own health and safety, and health and safety of others (to the extent required).
 - Promote a positive safety culture by contributing to health and safety consultation and communication.

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- Promptly respond to and report health and safety hazards, incidents and near misses to line management
- Attend mandatory training sessions (i.e. equal employment opportunity, health and safety) and mandatory training specific to position.

5. Person specification

Qualifications

- Relevant legal or paralegal qualifications.
- Experience in working in deceased estates administration with executors, including experience in dealing with contested estates. It is highly advantageous if this experience is in a not-for-profit role, and/or with an organisation that has experienced mergers
- Proven experience in project coordination
- Previous database experience including reporting and data analysis

Core selection criteria

- **Values alignment:** ability to demonstrate and authentically promote Uniting's values
- **Stakeholder management:** ability to understand, relate to and manage diverse and difficult stakeholder needs
- **Problem solving:** proven high level of analysis and complex problem solving.
- **Teamwork:** willingness to be proactive and help others, contribution to the continuous improvement of a positive, collaborative and effective work environment.
- **Communication:** Outstanding verbal and written communication, ability to relate meaningfully to people at all levels and ability to explain complex technical matters clearly and succinctly.
- **Self-management:** ability to manage multiple tasks and competing priorities.
- **Certificates, licences and registrations:** Current National Police Record Check; and Working with Children Check.

6. We are a child safe organisation

Uniting is a child safe organisation and is committed in everyday practice to ensure the safety and wellbeing of all children, at all times. As a child safe organisation, employment with Uniting is subject to a satisfactory national (and international where relevant) police check and Working With Children Check (in Victoria) and/or Working With Vulnerable People Check (in Tasmania) **prior** to commencement of any paid or unpaid work and/or participation in any service or undertaking.

This position description is subject to review and may change in accordance with Uniting's operational, service and consumer requirements.

7. Acknowledgement

I have read, understood and accepted the above Position Description

Employee

Name:

Signature:

Date:

Approved by: General Manager, Community & External Relations	Page 3 of 3	Division: Community & External Relations
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