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CANDIDATE BRIEFING DOCUMENT

EXECUTIVE OFFICER
SEPTEMBER 2020



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Our Story

It is often said that only three good things came out of World War I for Australia: the Australian War Memorial, which cares for the memories of our veterans; the RSL, which cares for our veterans; and Legacy, which cares for the families of incapacitated and deceased veterans.

With that heritage, Legacy has successfully supported our beneficiaries throughout South Australia and Broken Hill since 1928.

Legacy is dedicated to enhancing the lives and opportunities of our beneficiaries through innovative and practical programs aimed at: the protection of the basic needs of individuals and families; advocating for their entitlements, rights and benefits; assisting families through bereavement; and helping people thrive, despite their adversity and loss.

Depending on individual circumstances, Legacy can offer a range of social activities, services and support such as holiday respite, home maintenance, assistance with utility bills, advice and assistance with claiming pensions and other Government benefits, financial counselling, legal advice, and sometimes crucially, just putting food on the table.

When it comes to supporting children, Legacy can offer financial assistance for health and education, as well as help for extracurricular activities such as sport, music, drama etc. The youth support which Legacy provides is often critical and can make a real difference to the chances a young person has of a successful career and in life; chances which are often diminished by the loss of a parent. We also provide activities to bring the families together for social interaction. It is very important for our beneficiaries to realise they are not alone, and that Legacy is always here for them.

Legacy is a charitable not-for-profit organisation which needs to raise its own income to fund its services with approximately 389 members supporting 4,500 beneficiaries throughout South Australia and Broken Hill.

Our vision

Our vision is that no dependant of those who gave their lives or health as a result of serving their country suffers financial or social disadvantage.

Our mission

Our mission is to care for the dependants of deceased and incapacitated veterans in South Australia and Broken Hill.

Our values

- ▶ Integrity & Respect;
- ▶ Professionalism, Knowledge & Relevance;
- ▶ Compassion & Caring; and
- ▶ Community & Connectedness.

For more information visit www.adelaidelegacy.org.au

Message from our Chair and President



Legacy has been supporting and caring for veterans' families in South Australia for over 90 years. While we are a volunteer-based charity, we are also an ongoing business with a professional workforce that needs to raise funds and ensure we are compliant with our governance obligations. To be effective and successful, we need to be a contemporary organisation that respects our heritage and is, at all times, committed to our cause.

Our club has embarked on a journey of renewal and, as a consequence, we are looking to appoint an Executive Officer to guide our team through the associated change. Reporting to the Board Chair and Club President the appointee will be responsible for leading a small team of dedicated professionals in supporting our members to care for our beneficiaries.

To assure our ongoing sustainability, we are keen to appoint an individual with fundraising and marketing experience in the not-for-profit charitable sector. We are seeking a person who shares our empathy for the dependants of those who gave their lives or health as a result of serving their country.

We are fortunate to have been guided by a highly capable and professional leader over the last six years. We are now looking for the next leader to guide us through the next chapter in our history. We look forward to identifying someone who shares our values and ethos with a passion for leading an historic organisation with an iconic brand and an outstanding reputation. Hopefully that is you.

Mark Bourchier OAM
Chair

Chris Burns CSC
President

The Advertised Role

EXECUTIVE OFFICER

- Legacy Club of South Australia & Broken Hill
- Highly respected not-for-profit organization

Legacy is a voluntary organisation supported by veterans, servicemen and women, and volunteers drawn from all walks of life. Their support and services now extend to include the dependants of members of today's Australian Defence Force who lose their lives or are incapacitated as a result of their military service.

Legacy's Vision is that no dependant of those who gave their lives or their health as a result of serving their country suffers financial or social disadvantage. Legacy protects the basic needs of individuals and families; advocates for entitlements, rights and benefits of individuals and families; assists families to cope with bereavement and helps people thrive, despite their adversity and loss.

To endorse and drive their future goals and vision, the Legacy Club of South Australia & Broken Hill is seeking to appoint a highly credible, innovative, respected leader as **Executive Officer**. The Executive Officer will be a successful leader of people; a creative innovator who has the vision and personal impact to act as the face of the Legacy Club of South Australia & Broken Hill. We are seeking someone who "looks over the horizon" and is comfortable in all forums and environments, promoting the cause of Legacy.

Reporting to the Board, Key Responsibilities of the Executive Officer include:

- Development and successful implementation of the Board's Strategic Plans including delivery against fundraising targets and annual budgets;
- Effective management of the financial success and financial assets of the organisation;
- Alignment of the Club's culture with the core values and philosophy of Legacy;
- Expand and pursue fundraising and promotional opportunities for the Club;
- Provide authentic and enthusiastic leadership to staff and volunteers;
- Lead the development of the Club through the establishment of agreed governance, operational and fundraising initiatives and processes;
- Ensure the Club has the resources, capacity and capability to manage and maintain the continued quality of care, support and of services; and
- Ensure the values and ethos of Legacy are maintained by all members, staff and volunteers.

Your demonstrated exceptional communication skills and passion to promote the work of Legacy, forging successful partnerships and building the brand of the organisation are key to your success in this important role. Established leadership experience, financial acumen, ability to develop budgets, allocate and manage resources, and deliver quality services consistent with financial resources/



budgetary constraints are essential qualities as are your alignment and commitment to the core values of Legacy.

Tertiary qualification whilst being well regarded, are not essential. Previous ADF experience in a leadership role may be advantageous.

The Position Description and Candidate Briefing Document are available at www.vuca.com.au, click on the Services & Products tab. For any further queries contact VUCA Senior Associate, Ms Patricia Williams on 0438 388 530 during business hours for a confidential discussion. **Please forward your letter of application and CV in MS Word format to LEXO@vuca.com.au by Monday 5th October 2020.**

Position Description

Reporting to:	Board of Directors
Direct Reports:	Community Services Manager, Pensions Administration Officer, Corporate Services
External Relationships:	Members; Beneficiaries; Donors; Australian Defence Force; Federal, State and Local Governments; Private Sector; Community

The Person

- ▶ A leader who is empathetic, committed to and demonstrably lives the values of Legacy in all dealings with our beneficiaries, members, staff, volunteers, supporters and the community.
- ▶ A respected leader who champions the cause and brings out the best in people, celebrates and embraces diversity, challenges our thinking, recognises and promotes outstanding staff and is the flag bearer of the values and brand of Legacy
- ▶ A creative innovator who sees beyond the current context and pursues excellence in service delivery; that adapts to changing environments and demand; and identifies and takes advantage of fundraising opportunities that meet Legacy's values, strategic priorities and goals
- ▶ A highly credible, authentic, trusted, successful and caring leader who builds, drives and leads the appropriate culture to deliver great performance from members, staff and volunteers to achieve the best outcomes for beneficiaries, supporters and the community.
- ▶ A highly respected collaborator, who looks over the horizon, contributing to sector wide improvements focussed on caring for the dependants of deceased and incapacitated veterans in South Australia and Broken Hill.
- ▶ A skilled fundraiser and marketer who is innovative and contemporary in attracting new sources of funding while building on existing methodologies and mediums.
- ▶ An experienced and respectful public speaker and communicator who is comfortable in all forums and environments.

The Role of the Executive Officer

- ▶ Undertake high level advocacy and engagement to build relationships to promote the work of the Legacy Club of South Australia and Broken Hill.
- ▶ Build the sustainability and future capacity of the Club and foster a culture of collaboration.

- ▶ Provide leadership in the sector, being politically perceptive and leveraging these skills to enable productive influence over policy
- ▶ Identify, secure and maintain additional community, government and financial support for our work.
- ▶ Ensure the Legacy Club of South Australia and Broken Hill is at the forefront of innovation and influence to deliver quality care for our beneficiaries, support for our members and financial security for the Club.
- ▶ Provide leadership in the development of strategy and the translation of strategic objectives into practical, tangible and achievable deliverables within budgetary constraints and tight timeframes to create a high-performance culture.
- ▶ Report on and manage operational and financial risks to achieve strategic objectives and deliver on agreed financial and performance targets.
- ▶ Ensure the values and ethos of Legacy are maintained by all members, staff and volunteers so that it is a defining feature for all those who engage with the Legacy Club of South Australia and Broken Hill.
- ▶ Pursue fundraising opportunities consistent with the Strategic Plan, operational priorities and values of the Legacy Club of South Australia and Broken Hill.
- ▶ Provide and ensure a safe and healthy working environment for all members, staff, volunteers, beneficiaries and visitors.
- ▶ Develop strong and productive working partnerships with the Club's stakeholders and all other relevant parties to support the achievement of the Club's vision and mission.
- ▶ Lead the development of the Club through the establishment of agreed governance, operational, and fundraising structures and processes.
- ▶ Successfully manage the potential relocation of the Club's infrastructure by putting in place appropriate systems/infrastructure to ensure that the Legacy Club of South Australia and Broken Hill has the resources, capacity and capability to manage continuity and maintain the quality of care, support and services.
- ▶ Manage financial and non-financial risks to ensure that the Legacy Club of South Australia and Broken Hill is not exposed to unnecessary litigious action or harm.
- ▶ Provide strategic leadership in innovation and organisational matters, locally, nationally and internationally, further developing Legacy's leadership role in caring for the dependants of deceased and incapacitated veterans in South Australia and Broken Hill.
- ▶ Strengthen and maintain the brand of Legacy both internally and externally.

The Deliverables of the Executive Officer:

- ▶ Absolute alignment of the Club's culture with the core values and philosophy of Legacy.
- ▶ The implementation of Board decisions and Board approved strategies and policies.
- ▶ Timely development and successful implementation of annual workplans to deliver against the Strategic Plan including delivery against fundraising targets and annual budgets.
- ▶ The overall leadership and management direction and structures for the Legacy House team, to ensure appropriate organisational structure and delegation of authority is maintained to support effective and efficient operation of all programs and services.
- ▶ The effective executive management of the financial assets of the organisation.
- ▶ That the Legacy Club of South Australia and Broken Hill Strategic Plan remains relevant and the Board is provided with accurate and timely reports on the operations of the organisation and any emerging risks.
- ▶ That the members, staff and volunteers understand and practice the organisation's Workplace Health and Safety (WHS) Policy and Procedures to ensure overall compliance with WHS legislation.
- ▶ That the organisational risk management framework supports operations of the program areas and that the organisation's culture and risk management practices are aligned with the organisation's risk management objectives and strategies
- ▶ Meeting or exceeding all contractual and funding obligations.

Essential Skills (technical) Knowledge

- ▶ Outstanding human and resource management skills for a diverse service delivery organisation operating with both paid and volunteer staff.
- ▶ Financial acumen, the ability to develop budgets, allocate and manage resources, and deliver quality services consistent with financial resources/ budgetary constraints to meet contractual requirements.
- ▶ High level communication skills to: promote the work of Legacy; successfully forge partnerships locally, nationally and internationally where necessary; and build the brand and funding base of the Legacy Club of South Australia and Broken Hill.
- ▶ Proven leadership within and extensive knowledge of the not for profit sector, particularly in the areas of veterans and fundraising.
- ▶ Alignment and commitment to the core values of the Legacy Club of South Australia and Broken Hill.

Living & Working in Adelaide, South Australia

Adelaide is one of the most liveable cities on the planet. It is well known for its arts festivals, fine foods and wine, retail and dining experience and spirit of entrepreneurship and innovation. It has an advanced economy, world class universities and a flourishing multicultural heritage. Adelaide is the traditional home of the Kurna people and has a strong indigenous culture today.

LIFESTYLE

Adelaide is known for its **Mediterranean style climate**, where the weather is pleasant and moderate most of the year. Year-round big blue skies mean average winter temperatures of 16 degrees Celsius (°C) and 28°C in summer. Hot days can be real sizzlers and easily reach 40°C though!

Adelaide is a city that offers the physical and emotional space to breathe. There is a sense of freedom here – of expression, of movement, of thought. With a **diverse and eclectic array of accessible experiences**, it's a city that allows time for immersion, paired with a sense of space and freedom that actively encourages true indulgence.

The Adelaide Hills which are home to many villages, towns, wildlife parks and natural resources to explore, are less than half an hour drive from the City Centre. You'll never be far away from some of the most **pristine beaches** and water sanctuaries in the world, with almost 30km of beaches bordering Adelaide. Our beaches are famous for the beautiful waters and wide sandy foreshores. Beachside areas like Glenelg, Brighton and Henley Beach are only 15-minute drives from the City and offer **cosmopolitan hearts with retail and dining opportunities**. Within short drives from the city centre are Port Willunga where you can scuba dive in natural and man-made reefs, Port Adelaide where you can frolic with dolphins and St Kilda where you can wander the mangroves and natural reserves, also home to Dolphins and other Australian fauna.

A number of international measures rate metropolitan Adelaide highly for liveability, quality of life and cost of living. The Economic Intelligence Unit undertakes an annual Liveability Ranking and Overview of 140 cities around the world and Adelaide has in recent years consistently ranked 5th in the world. The Property Council of Australia undertakes its own annual survey

on liveability of Australia's top 10 biggest cities. In this survey Adelaide is ranked second only to Canberra, our nation's capital, and above all other capital cities. The Mercer Quality of Living Survey compares global cities and is primarily used to inform multi-national companies regarding optimal office locations and employee conditions. Adelaide was most recently listed as 29th in the World and has consistently ranked highly in this survey. Mercer's Cost of Living Report measures the comparative cost of over 100 items and Adelaide continues to outperform other Australian Capital Cities in this report

REGIONAL EXPERIENCE:

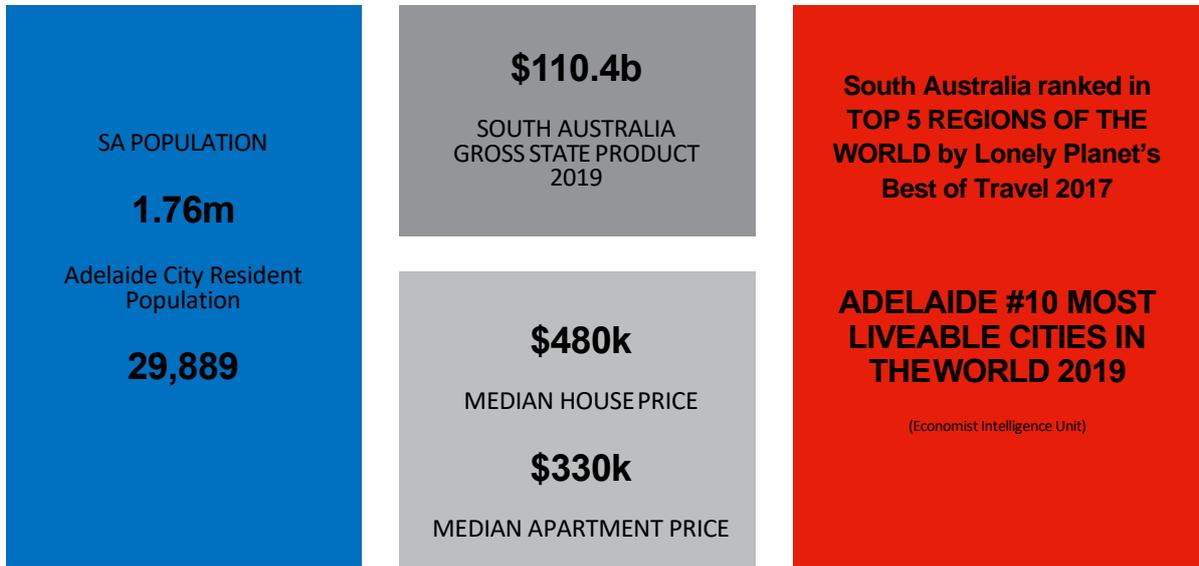
The regions surrounding Adelaide offer a unique experience with gourmet food offerings, internationally renowned wine, villages to explore and wildlife and natural attractions.

Adelaide is a city that lives well beyond its conveniently designed square mile epicentre, flowing seamlessly into world-famous wine and food regions such as Barossa, just an hour's drive north, or coastal escapes in the Fleurieu or Yorke Peninsula. You'll be spoilt for choice.

Travel another hour north and you'll reach the Clare Valley, which is famous for its Rieslings. The Adelaide Hills has some stunning whites and there's McLaren Vale and Langhorne Creek on the Fleurieu Peninsula – about an hour's drive south of the city. Drive yourself or join a guided tour of Adelaide and its surrounds - the choice is yours. Take a road trip and discover the reds from the Coonawarra on the Limestone Coast.

Kangaroo Island is an iconic destination, just two hours' drive and a short ferry ride south of Adelaide. It has pristine beaches, unique wildlife, awesome sunsets and fantastic food and wine.

South Australia & Adelaide, Fast Facts



One of the world's most liveable cities

Adelaide offers a relaxed, easy-going lifestyle, and is rated as one of the top 10 liveable cities in the world (Economist Intelligence Unit). It is located in a beautiful region of South Australia, which is also ranked in the top 5 of the world's regions.

Australia's most affordable mainland capital

Your money will go much further in Adelaide. Studies show it costs 21% more to live in Melbourne and 23% more to live in Sydney than Adelaide. Adelaide is around 4% cheaper than Brisbane and Perth (2016 Economist Intelligence Unit), meaning you will have more money to discover Australia during your weekends and holidays.





Contact Information

For a confidential discussion regarding the Executive Officer position, please contact VUCA Senior Associate, Ms Patricia Williams on 0438 388 530.

Applications, including your current CV and a letter of introduction are to be forwarded in Word format to LEXO@vuca.com.au

Applications close 5pm 5th October 2020

Important Information

Please note that VUCA Trusted Advisors believes that while the information contained in this document is true to the best of the Company's knowledge at the time of writing, such information may change without notice. Further, the information herein is the property of the Company and must not be published or attributed unless explicitly agreed.