

Position Description – Donor Services Manager

Work Type

Part Time (0.8) or Full Time

Location

East Melbourne and from home as required

Direct Reports

Donor Services Coordinator

Background

Australian Communities Foundation (ACF) is a community of giving, powered by a courageous ambition: a fairer and more sustainable Australia. As a broker of change, we connect those who can give with the people and organisations leading the way. We seek to create a fairer Australia by activating a nation of givers and are Australia's only nationally focused community foundation. ACF coordinates over 900 grants to the community each year to the value of roughly \$12.5 million through a donor-advised grant making program. ACF manages a discretionary fund, the Impact Fund, which gives ACF the opportunity to focus on high impact philanthropy and further enable ACF's leadership alongside its wider community of donors and other collaborators in the philanthropic sector.

Position Purpose

The Donor Services Manager role reports to the Head of Philanthropic Services. The objective of the role is to ensure clients of ACF receive a best practice end to end experience. This role will develop and lead the donor and client experience of the Foundation and also play a key role in assisting with the development and support of new products and services for the Foundation. This role is ultimately responsible for implementing and overseeing processes and experiences within the organisation with the objective that ACF donors/clients express a high degree of customer satisfaction. This is a senior role within the ACF team and has regular interaction with the Leadership Team and the ACF Board's Philanthropy & Impact Committee. This role manages the Donor Services Coordinator.

Position Summary

The Donor Services Manager is responsible for:

- Supporting the Head of Philanthropic Services with strategic development and delivery of the Donor and client experience at ACF. Including:
 - Developing and delivering strategic workshops/programs to suit the needs of HNW DAFs/PAFs and FFS clients (in partnership with the Philanthropy & Engagement Manager)

- Ongoing management of client and Secretariat services for ACF clients
 - Provide strategic advice and implement best practice donor experience / client services
- Support the Head of Engagement with strategic development and delivery of the Business Development (BD) work at ACF. Including:
 - Attend client meetings and represent ACF service offering
 - Assist with the development of BD proposals and presenting as required
 - Be the 'Donor Services arm' of BD and ensure the donor/client experience is fully integrated into BD.
- Leading the development and delivery of the donor/client experience lifecycle
 - Work closely with stakeholders across the Foundation to ensure all clients receive a streamlined and pleasurable service offering
 - Ensuring all clients are supported and have a high degree of satisfaction with the Foundations service offering
- Leading and supporting the development of strategic partnerships aligned with ACF Strategy

Key Responsibilities

Community of Donors - fund administration and donor care

- Support individual donors and fee for service (FFS) clients to develop and enact their philanthropic objectives through advice on structure, compliance, fundraising and administration in line with the Foundation's policies
- Continue to develop and enhance the design and delivery of the ACF donor experience
- Oversee all sub fund establishment, expenses, administration and closure, supported by the Donor Services Coordinator to ensure a smooth end to end process
- Oversee the design of donor /client documentation, processes and tailored correspondence when required
- Oversee the design and delivery of donor engagement events where relevant, supported by the Marketing & Events Coordinator
- Work with Impact and Insights Manager to deliver qualitative and quantitative reporting for donor activity for inclusion in committee, board and external reports

Business Development and Engagement

- Support the Head of Philanthropic Services with strategic development and delivery of the Donor experience at ACF. Including:

- Developing and delivering strategic workshops/programs to suit the needs of HNW DAFs/PAFs and FFS clients (Corporates/NFPs etc)
- Ongoing management of client and Secretariat services for ACF clients
- Provide strategic advice and implement best practice donor experience / client services
- Support the Head of Engagement with strategic development and delivery of the Business Development (BD) work at ACF. Including:
 - Attend client meetings and represent ACF service offering
 - Assist with the development of BD proposals and presenting as required
 - Assist with the design and establishment of processes and procedures to ensure a best practice client/donor experience from first contact as a prospect.
- Consult on and assist with the design and delivery of fee-for-service program of work as requested
- Lead and support the development of strategic partnerships aligned with ACF Strategy

Management of information and communications

- Manage and oversee accurate and efficient capture, safe storage and retrieval of Donor and fund information in the Foundations systems and databases, including
 - CRM Management- oversee system usage and access, ensuring data security and integrity
 - Manage data architecture and data auditing efforts, ensuring data accuracy and consistency
 - Implement quality assurance efforts, testing and deploying new or updated applications and processes
- Work with Donor Services Coordinator to communicate fund compliance and administration information and opportunities to donors
- Work with the Foundation's communications team to generate donor stories and ACF activities

Philanthropy & Impact Committee/Board support

- Contribution to Management report with updates of strategic initiatives and activities and qualitative donor analysis
- Produce accurate record of donor activities for quarterly Committee and Board papers
- Other ad hoc support with Board papers as requested

Other

- Representation of ACF at conferences and sector wide events
- Assistance to the ACF Senior Leadership team with special projects as required from time-to-time

- Provide other assistance to the Head of Philanthropic Services, CEO and Leadership team as required.

Skills & Competencies

- Ability to work as an effective and collegiate senior member of a small team
- Ability to work with a broad range of stakeholders and develop positive working relationships that uphold the reputation of ACF
- Excellent writing, editing and formatting skills with proven ability to proofread and edit
- Experience with donor servicing and understanding of the role of the third sector and philanthropy
- Good interpersonal skills, diplomacy and political nous.
- Ability to solve problems and use initiative

Key Selection Criteria

- Experience in donor/client management and coordination, organising and engagement activities (highly regarded)
- Experience in managing multiple and complex clients/customers
- Relevant professional experience, including experience in the not-for-profit sector and/or philanthropic entities
- High level of understanding of current relevant legislation relating to philanthropic vehicles and structures
- Working knowledge of organisational strategic planning development and implementation
- Understanding and experience of grant making, grant seeking, fundraising and evaluation (highly regarded but not essential)
- High level competency with databases and web-based resources
- Ability to work with autonomy, highly organised and able to move between tasks and meet deadlines
- Experience working with committees or different stakeholders to achieve results
- Ability to develop and maintain positive work relationships with team and external stakeholder/clients
- High relational EQ demonstrated in donor/client interactions and team partition as a manager and team member.

ACF Staff Team Expectations

- Demonstrate ACF vision, values and culture in your daily work
- Take a proactive role in promoting equality and anti-discriminatory practice
- Be aware that you have a duty of care for the health and safety of yourself and others



- Assist in maintaining harmonious workplace relationships by openly and efficiently communicating with internal Board, staff, volunteers and external parties
- Be an active, positive team member by demonstrating a willingness to help and support in all areas as required.