

Position title:	Philanthropy Coordinator (Major Giving)
Dept. / Team:	Bequests
Reports to:	Manager, Planned and Major Giving
Position Number:	6913
Classification:	Above Award
Award or Agreement Name:	Social, Community and Homecare Disability Services Award 2010
Delegation:	Not Applicable

A. Position purpose

The Philanthropy Coordinator – Major Giving provides operational support to the role of Manager, Planned & Major Giving (MPMG):

1. Primary Purpose: Execute the Planned & Major Giving Strategy and annual Business Development Plan through best practice supporter development and care for existing and prospective supporters.
2. Secondary Purpose: Assist the Business Development Department to attain its objectives as follows:
 - a. Identify supporters who are, or may become, middle and major donors, in consultation with the MPMG.
 - b. Identify supporters who may be in a position to significantly assist Diabetes Victoria with its middle and major giving activities (e.g. persons of influence whose connections may assist Diabetes Victoria in the longer term).
 - c. Undertake due diligence of new and prospective supporters to ensure alignment with the mission and strategic priorities of Diabetes Victoria.
 - d. Encourage and support people who have the capacity to make a major gift to pursue their philanthropic goals by supporting Diabetes Victoria with their gift.
 - e. Stewardship of middle and major gift donors by supporting their decision through regular expressions of appreciation and by promoting the overarching achievements of Diabetes Victoria and its supporters.
 - f. Develop compelling and detailed cases for support, impact reporting, and other necessary collateral including reports, and proposals.
 - g. Proactively identify opportunities for innovation and quality improvement within the Philanthropy team.

B. Business Unit / Departmental Purpose

The Business Development Department upholds a holistic view of Diabetes Victoria's stakeholders, working to develop Diabetes Victoria's relationships with members, customers, donors, partners, sponsors, volunteers and other supporters. The primary function of this Department is to lift stakeholder engagement with Diabetes Victoria's brand and many services to advance our mission – to help all Victorians affected by diabetes to live well.

The Department is comprised of Fundraising and Partnerships, Membership and Marketing, and Philanthropy teams. The Department is responsible for driving and generating part of the annual financial surplus for Diabetes Victoria, whilst taking stakeholders on a journey that will see them increase their commitment and contribution to the organisation.

C. Key accountabilities

KEY RESULT AREAS (KRAs)	TASKS	KEY PERFORMANCE INDICATORS (KPIs)
	The main activities required to achieve a KRA. The key measurable outputs or deliverables required of the position.	The quantitative/qualitative evidence used to measure how well the KRAs have been achieved.
1. Middle & Major Giving Stewardship	<ul style="list-style-type: none"> Support the MPMG with the implementation of the Planned & Major Giving Strategy and annual Business Plan. Identify and qualify middle and major donor prospects to support Diabetes Victoria funding priorities Undertake due diligence of prospects and supporters to ensure alignment with organisation values Progress, as appropriate, middle and major giving supporters through the moves management pipeline Proactively engage and communicate with middle and major giving supporters and prospects via letter, phone, video conference, or face to face Make detailed notes on Salesforce of all communication and interactions (phone, mail, email, social media, video call, or face to face) Develop and execute major giving specific events and attend all such events Assist with the development and delivery of the Major Giving Advisory Group and support Diabetes Victoria's Board and Senior Leadership team in their network development of prospects and supporters 	<ul style="list-style-type: none"> The Major Giving Program is promoted at every opportunity Year on year increase in the number of middle and major donors and prospects Year on year increase in the value of gifts from middle and major donor supporters. All donors who have made a significant gift to Diabetes Victoria are contacted within 2 business days from receipt of the donation All scheduled communications and contacts with middle and major givers are conducted appropriately and at the designated time Undertake detailed donor profiling and prospecting within Salesforce to build pipeline of middle and major donors In conjunction with the MPMG, engage in phone or face to face interaction, as appropriate, with 95% of all major donor supporters and prospects, at least 70% of middle donor supporters and prospects. In conjunction with the MPMG, work with internal and external stakeholders to establish and implement the objectives and tasks of the Major Giving Advisory Group
2. Business Development Activities	<ul style="list-style-type: none"> Assist with the development and growth of the Diabetes Victoria Foundation Assist the MPMG to integrate the Major Giving Program activities with other fundraising and membership activities within the Business Development Department Refer appropriate prospects to other Business Development team members who have specific responsibilities in designated fundraising activities such as trusts and foundations, corporate, sponsorships and partnerships, events, etc Maintain a detailed and up-to-date database of all new and existing Donors, Bequestors, Members, Fundraisers and other supporters. 	<ul style="list-style-type: none"> Development of compelling and detailed cases for support, impact reporting, and other necessary collateral including reports, and proposals. Execution of the middle and major supporter donor journey, with cross-sell opportunities of other Diabetes Victoria offerings promoted as appropriate. Salesforce is kept up-to-date with accurate information regarding middle and major givers and details of other potential supporters of Diabetes Victoria Implementation of the activities outlined in the annual Business Plan and Planned and Major Giving strategy

3. Diabetes Victoria promotion and campaign development	<ul style="list-style-type: none"> • Contribute to the development and financial growth of the Diabetes Victoria Foundation through supporter communication and meetings • Provide supporters with a general overview of the Diabetes Victoria programs, services, research, and offerings • Refer supporters to relevant Diabetes Victoria business units as appropriate. • Collaborate with business units across Diabetes Victoria to provide supporters and prospects with relevant and compelling information and reports, and demonstrate the impact of philanthropy to those living with diabetes. • Support the MPMG with sourcing and drafting of suitable major giving related articles for internal and external marketing and promotional publications In consultation with the MPMG, prepare and review in-house major giving related publications and collateral including supporter surveys; brochures, cases for support, reports, and updates. 	<ul style="list-style-type: none"> • Demonstrates a broad understanding of the Diabetes Victoria programs, services and offerings • Development compelling ‘asks’ and reports and demonstrate the impact of philanthropy to those living with diabetes. • Supporters referred to appropriate Diabetes Victoria business unit • Promotion of Diabetes Victoria and Diabetes Victoria Foundation through all aspects of the Planned and Major Giving Strategy. • Articles for internal and external marketing and promotional publications written and submitted within designated timelines. • Development and updates as necessary in relation to Planned and Major Giving collateral is done in a timely manner.
4. Team building and development	<ul style="list-style-type: none"> • Communicate through team meetings and team briefs in order to appropriately inform all team members about Diabetes Victoria’s vision, mission, values and objectives • Monitor general industry and competitor trends, providing recommendations to team on improvements to the Philanthropy strategy at Diabetes Victoria. 	<ul style="list-style-type: none"> • Where required, actively take the role of Chair in team meetings. • Positive feedback from team members across Diabetes Victoria

D. Organisational requirements

Policy and Practice	Compliance	<ul style="list-style-type: none"> • Comply with company policies and procedures • Attend/complete mandatory compliance training • Display duty of care at all times with Workplace Health and Safety • Demonstrate awareness of Risk & Compliance obligations and undertake necessary actions
Continuous Learning	Professional Development	<ul style="list-style-type: none"> • Actively participates in the Professional Development Review System • Actively develop oneself
Quality	Policy & Procedures	<ul style="list-style-type: none"> • Ensure that all work practices meet Diabetes Victoria’s ISO 9001 quality certification requirements as outlined in the Diabetes Victoria Quality Policy (EEQ-416)
Customer Service	Code of Practice	<ul style="list-style-type: none"> • Adhere to the Customer Service Framework (EEQ-121) when dealing with all customer enquiries and complaints

E. Position requirements

The essential skills, knowledge and experience required of this position

Skills
1. Relationship management/development
2. Sophisticated database management
3. Consultation and collaboration.
4. Data analysis
5. Direct marketing
6. Emotional intelligence
7. Presentation development and delivery
8. Writing (to meet health literacy standards) and copywriting
9. Ability to communicate effectively with persons of all ages and socio-economic backgrounds
10. Ability to show empathy and understanding to persons experiencing problematic personal circumstances

Knowledge (Qualifications/Certifications/Licenses)
1. Eligibility for membership of the Fundraising Institute of Australia
2. Motor Vehicle Driver License
3. Current Police Check

Experience
1. Proven experience in a similar role e.g. middle donor giving, major giving, or philanthropy preferred
2. High levels of computer literacy and experience working with CRM systems (Salesforce experience desirable)
3. Experience implementing moves management strategies for a pipeline of major or middle donor supporters and prospects
4. Strong communication skills, including experience in relationship fundraising
5. Understanding of the needs of people from culturally and linguistically diverse backgrounds

F. Behavioural requirements

The behavioural competencies required to be demonstrated by an individual in order to perform this position effectively (please refer to dictionary of behavioural competencies)

Behavioural competencies	Level of proficiency 1 - 5	Proficiency Description <i>See competency dictionary for additional detail</i>
1. Networking and Relationship building	5	Building and actively maintaining working relationships and/or networks of contacts to further the organisation's goals <i>Creates networking opportunities</i>
2. Impact and Influence	5	Gaining support from and convincing others to advance the objectives of the organisation <i>Designs complex influence strategies</i>
3. Communication	5	Listening to others and communicating in an effective manner that fosters open communication <i>Communicates strategically</i>

4. Values and Ethics	5	Fostering and supporting the principles and values of the organisation <i>Exemplifies and demonstrates the organisation's values and ethics</i>
5. Visioning and Strategic Direction	4	Developing and inspiring commitment to a vision of success; supporting, promoting and ensuring alignment with the organisation's vision and values <i>Influences strategic direction</i>

G. Key relationships/interactions

The internal and external relationships/interactions and why the position interacts with these parties

	Who	Why (Reason for relationship)
INTERNAL	Manager, Planned and Major Giving	Direct Manager - receive leadership and strategic direction guidance.
	Head of Business Development, Business Development team, Senior Management Team, Finance team, Salesforce team,	Work across all these relationships to gain support, influence management to adopt new concepts, enlist them to support initiatives and help achieve results on time. Clearly articulate and drive projects utilising appropriate stakeholders.
EXTERNAL	Middle donors, major donors, bequestors, members, supporters, volunteers, researchers, peer support groups, community groups, the general public, organisations e.g. lawyers, accountants, financial advisors and estate planners	Influence and market Diabetes Victoria's strategic direction in order to attract research funding and support services through the Bequest Program.

H. SIGNATORY

Last updated: July 2021

Approved By: Manager, Planned & Major Giving

Name: _____

Signature: _____

Date: _____

Position holder acceptance: **Name:** _____

Signature: _____

Date: _____