

## POSITION DESCRIPTION

General Information:	
Position Title:	Philanthropy Manager
Incumbent:	
Function & Team/Program:	Fundraising - Philanthropy
Location(s):	Sydney National Office, NSW, Melbourne Office, VIC
Manager's Position Title:	National Manager, Trusts & Foundations
Manager's Name:	Elena Mailer
Date Prepared:	November 2025
Prepared By:	Elena Mailer
Approved By:	Rosie O'Brien, Acting Philanthropy Group Manager

Primary Purpose of this Position <i>(In one sentence - why does the role exist?)</i>
Working with the National Manager Trusts & Foundations and four other Philanthropy Managers the Philanthropy Manager will play a key role in deepening our relationships with philanthropic partners, establishing new partnerships and supporting the growth in revenue in the area of philanthropic trusts and foundations.

Scope:	
Direct Reports to this Position <small>By Position Title</small>	Indirect Reports <small>Total Number</small>
<ul style="list-style-type: none"> <li>Nil</li> </ul>	<ul style="list-style-type: none"> <li>Nil</li> </ul>
Financial Dimensions controlled by this Position <i>(Include key financial metrics such as revenue growth, income &amp; expense budget, etc)</i>	
Direct control	Indirect control
<ul style="list-style-type: none"> <li>Revenue generation and growth</li> </ul>	<ul style="list-style-type: none"> <li>Contribute to planning and provide support to enable increased revenue generation from trusts and foundations.</li> </ul>
Other Dimensions of this Position	
This role provides stewardship and management of key philanthropic trusts and foundations nationally, as directed by the Manager. This includes, but is not limited to management of a pipeline of current supporters and cultivation of prospective philanthropic partners; working with cross functional teams to identify funding opportunities and needs nationally; information gathering from key stakeholders to create persuasive proposals, acquittal reports and communication materials; attending some philanthropy	

networking events and face-to-face meetings with prospective philanthropic partners and research of the philanthropic environment to maximise funding opportunities.

### Setting Priorities *(How is work prioritised?)*

**How often does employee prioritise their own work?**  
Eg. Daily, weekly, monthly, annually, other

Daily, weekly and monthly

**How often does employee determine the priorities of others?**

The role will have impact upon the workflow of others across the organisation: working with cross-functional teams to develop funding submissions and acquittal reports; volunteering opportunities; working with Regional Program Managers and *Learning for Life* program teams to develop experiential opportunities for philanthropic partners.

### Key Relationships *(Who does the role interact with? List the titles of individuals, departments and organisations frequently interacts with)*

#### Internal

- Philanthropy team
- Policy and Programs team
- Research and Advocacy team
- Finance team
- Communications team
- General Managers and Regional Program Managers
- *Learning for Life* Program Coordinators
- Business and Information Systems

#### External

- Trust and foundation staff and/or trustees
- Trustee and philanthropic services key staff
- Donors, corporate partner supporters and other relevant philanthropic stakeholders
- Philanthropy Australia and other key industry bodies
- *Learning for Life* students and families

### Key Decision Making in this Role: *(What are the key decisions and recommendations made in this role?)*

#### Decisions Expected

- Prioritisation of workload and time management
- Planning and assessment of new opportunities including documented internal consultation
- Approach and content for funding opportunities
- Understanding and documenting philanthropic partners' needs and strategic objectives
- Timing of approaches, meetings and invitations to senior Smith Family staff to attend meetings when appropriate

#### Recommendations Expected

- Research and recommend projects for funding proposals
- Improvements to processes to ensure team efficiency
- Input to team planning

<b>Key Responsibilities / Accountabilities:</b>	
<b>Major Area: Relationship Management and Business Development</b>	<b>% of Job: 70%</b>
<ul style="list-style-type: none"> <li>Relationship management and stewardship of trusts and foundations as designated by the Manager to deliver above budgeted income levels</li> <li>Develop, project manage and write high quality submissions to secure funding from trusts and foundations</li> <li>Develop, project manage and write high quality acquittal reports and other reporting collateral for trusts and foundations</li> <li>Contribute to team research of the philanthropic environment to inform planning, maximising funding opportunities and increasing revenue generation from trusts and foundations</li> <li>Research and recommendations for new business grant submissions</li> <li>Keep up to date with The Smith Family's strategic plan, programs and national funding priorities in order to articulate these to current and potential partners</li> <li>Working with cross-functional teams to manage, facilitate and lead writing both funding applications and acquittal reports</li> </ul>	
<b>Major Area: Grant Administration</b>	<b>% of Job: 15%</b>
<ul style="list-style-type: none"> <li>Grant administration including coding of income, distribution of invoices and receipts, communication with partners, and regular maintenance of trust and foundation contact records and data in CONNECT database</li> <li>Other processes and administration activities as required to ensure efficient and effective operations of the team</li> </ul>	
<b>Major Area: Internal Stakeholder Engagement</b>	<b>% of Job: 15%</b>
<ul style="list-style-type: none"> <li>Collaborate with Policy &amp; Programs team, General Managers, Regional Program Managers and the broader Philanthropy team to both create and respond to funding opportunities in line with The Smith Family's strategic plan, and to prepare high quality, accurate acquittal reports for donors</li> </ul>	

<b>Key Challenges in Achieving Goal(s):</b> <i>(What are the key challenges faced by this role in meeting goals/objectives)</i>
<ul style="list-style-type: none"> <li>Balancing workload and prioritising work tasks to competing and strict deadlines</li> <li>Eliciting the most pertinent information from other Smith Family teams for effective, timely applications and acquittals</li> <li>Ensuring regular internal and external communication</li> <li>Managing internal and external stakeholder expectations</li> <li>Securing funding in a highly competitive market</li> </ul>

<b>Qualifications, Experience and Competencies:</b> <i>(What background, knowledge, experience or competencies are required to perform the role at the expected level?)</i>		
<b>Education / Qualifications:</b>	<b>Essential</b>	<b>Desirable</b>
	<ul style="list-style-type: none"> <li>Tertiary qualification and/or commensurate workplace experience in a similar role</li> </ul>	
<b>Experience:</b>	<b>Essential</b>	<b>Desirable</b>

	<ul style="list-style-type: none"> <li>• Grant, tender or similar writing experience, with keen attention to detail and the ability to craft a persuasive narrative</li> <li>• Three years plus working in the philanthropic, not-for-profit, CSR sector, and/or similar sector</li> <li>• Understanding of fundraising principles</li> <li>• Strong understanding of philanthropy and the basic structures and motivations for giving</li> <li>• Experience with Excel and CRM databases</li> </ul>	<ul style="list-style-type: none"> <li>• Experience and/or understanding of the education sector and working with disadvantaged children and families</li> <li>• Excellent desktop research skills</li> <li>• Understanding of the fundamentals of program evaluation</li> <li>• A strong track record in securing major donations, grants, tenders or other support</li> </ul>
<b>Competencies:</b>	<b>Essential</b>	<b>Desirable</b>
	<ul style="list-style-type: none"> <li>• Excellent written and verbal communication skills</li> <li>• An engaging and professional communications style, especially over email</li> <li>• Superb interpersonal skills and a proven ability to develop mutually beneficial, professional relationships</li> <li>• Strong analytical skills and the ability to grasp and interpret complex information quickly</li> <li>• Ability to problem solve</li> <li>• Time management skills and ability to work to deadlines</li> <li>• Ability to work with diverse stakeholder groups</li> <li>• Intermediate to Advanced knowledge of Microsoft Office suite</li> <li>• Ability to understand financial documents such as audited financial statements and program budgets</li> <li>• Excellent attention to detail</li> <li>• Problem solving skills</li> </ul>	<ul style="list-style-type: none"> <li>• Ethical and values driven worker</li> <li>• Enthusiastic and motivated team player</li> <li>• Ability to work remotely, and within a large and complex organisation</li> </ul>