

POSITION DESCRIPTION

General Information:	
Position Title:	Philanthropy Coordinator
Function & Team/Program:	Fundraising - Philanthropy
Location(s):	National Office, Sydney
Manager's Position Title:	National Manager, Trusts and Foundations
Manager's Name:	Elena Mailer
Date Prepared:	January 2026
Prepared By:	Elena Mailer, National Manager Trusts and Foundations
Approved By:	Jasmine Edwards, 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 (T&F) and other Philanthropy Managers (PMs), the Philanthropy Coordinator (P) will play a key role in (1) Providing administrative support to the PMs and National Manager, supporting T&F revenue growth from philanthropic trusts and foundations (2) assisting with the preparation of reports and submissions (3) deepening our relationships with mid value philanthropic partners, (4) and supporting the identification, cultivation, solicitation and stewardship of prospects and donors	
Scope:	
Direct Reports to this Position By Position Title	Indirect Reports Total Number
• Nil	• Nil
Financial Dimensions controlled by this Position (<i>Include key financial metrics such as revenue growth, income & expense budget, etc</i>)	
Direct control	Indirect control
• Revenue generation and growth of the lower to mid-value portfolio of T&F.	<ul style="list-style-type: none"> Contribute to planning and provide support to enable increased revenue generation from trusts and foundations. Provide support to T&F's budgeting and income monitoring.
	<ul style="list-style-type: none"> Assist in the management of grant agreements and contracts Prepare and provide inputs to acquittal reports.
Other Dimensions of this Position	

This role provides stewardship and management of the lower-to-mid level philanthropic trusts and foundations nationally, as directed by the National Manager. This includes, but is not limited to management of a pipeline of current supporters; working with cross- functional teams to identify funding opportunities; information gathering from key stakeholders to create persuasive proposals, acquittal reports and communication materials; and research of the philanthropic environment to maximise funding opportunities.

Setting Priorities (*How is work prioritised?*)

How often does employee prioritise their own work?	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 within and supporting the T&F team and across the wider Fundraising team to expand the prospect and donor pool through prospecting, and with cross- functional teams to develop funding submissions and acquittal reports.

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
- Understanding and documenting philanthropic partners' needs and strategic objectives

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

Internal	<ul style="list-style-type: none"> • Philanthropy team • Policy and Programs team • Research and Advocacy team • Finance team and Fundraising Commercial Manager • Communications team • General Managers and Regional Program Managers • <i>Learning for Life</i> Program Coordinators
External	<ul style="list-style-type: none"> • 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 • <i>Learning for Life</i> students and families

Recommendations Expected

- Research and recommend potential prospects
- Market canvas for potential grant opportunities and recommend projects for funding proposals
- Improvements to processes to ensure team efficiency
- Input to team planning

Key Responsibilities / Accountabilities:

Major Area: Relationship Management and Business Development	% of Job: 25%
<ul style="list-style-type: none"> • Relationship cultivation, management and stewardship of lower-to-mid-value trusts and foundations as designated by the National Manager. In conjunction with the NM, develop a stewardship plan for these donors. • Support PMs with initial prospect research arising from initiatives such as Wealth Scan and Strategic Grants. • Support PMs through updates to our CRM system to ensure data and relationship management continuity. • Support PMs with high quality donor stewardship planning • Develop, project manage and write high-quality acquittal reports and other reporting collateral for trusts and foundations supporters 	
Major Area: Trusts & Foundations prospect research	% of Job: 20%
<ul style="list-style-type: none"> • Proactively plan and execute strategies to identify potential T&F donors whose interests align with TSF's mission and conduct prospect research to qualify them using in-house and external information sources. • Research, prepare and distribute prospect briefings to support fundraising efforts of T&F. • Drive and oversee the collection, storage and usage of prospect-related data for T&F team, ensuring the relevance, appropriateness, accuracy and integrity of data, and compliance with relevant privacy legislation. • Support the development of the T&F's prospect assignment and management process and provide inputs to Quarterly prospect portfolio reviews and contribute to T&F's effective portfolio segmentation exercises. • Work with and act as a team liaison with the Philanthropy team's Prospect Researcher. 	
Major Area: Team reporting and coordination	% of Job: 30%
<ul style="list-style-type: none"> • Enable data-driven budgeting, planning and progress by producing reports from TSF's CRM. • Champion data culture within T&F, focusing on pipeline management and financial reporting. • Ensure T&F requirements for funding accountability are met including maintaining accurate files and records on forthcoming submission dates, grant guidelines and requirements etc. • Coordinate onboarding for new T&F colleagues • Support the NM with internal reporting requirements of the team • Work with the Fundraising Commercial Manager to support internal budgeting and financial reporting requirements of the team • Assist the NM and other team members with preparation for donor engagement events including contributions to briefing notes, event logistics and on the day support. • Assist with content and logistics for team development days 	
Major Area: Grant Administration	% of Job: 25%
<ul style="list-style-type: none"> • Grant administration including communication with partners, and supervising integrity of Trust and Foundation contact records and data in CONNECT database. • Other processes and administration activities as required to ensure efficient and effective operations of the team including management of FOLIO, grant agreements, contracts and acquittals 	
Key Challenges in Achieving Goal(s): <i>(What are the key challenges faced by this role in meeting goals/objectives)</i>	

<ul style="list-style-type: none"> • Balancing workload and prioritising work tasks to competing and strict deadlines • Managing internal and external stakeholder expectations • Securing funding in a highly competitive market 		
Qualifications, Experience and Competencies: <i>(What background, knowledge, experience or competencies are required to perform the role at the expected level?)</i>		
Education / Qualifications:	Essential	Desirable
	<ul style="list-style-type: none"> • Tertiary qualification and/or commensurate workplace experience in a similar role 	
Experience:	Essential	Desirable
	<ul style="list-style-type: none"> • Two years plus working in the philanthropic, not-for-profit, CSR sector, and/or similar sector; • Understanding of fundraising principles; • Understanding of philanthropy and the basic structures and motivations for giving; • Experience with Excel and CRM databases 	<ul style="list-style-type: none"> • Experience and/or understanding of working in grant administration • Excellent desktop research skills • Understanding of the fundamentals of program evaluation
Competencies:	Essential	Desirable
	<ul style="list-style-type: none"> • Excellent written and verbal communication skills • Interpersonal skills and an ability to develop mutually beneficial, professional relationships • Strong analytical skills • Ability to problem solve • Time management skills • Ability to work with diverse stakeholder groups • Intermediate knowledge of Microsoft Office suite • Ability to understand financial documents such as audited financial statements and program budgets • Excellent attention to detail 	<ul style="list-style-type: none"> • Ethical and values driven worker • Enthusiastic and motivated team player • Ability to work within a large and complex organisation