

POSITION DESCRIPTION

General Information:	
Position Title:	Philanthropy Coordinator
Incumbent:	Amy Courts
Function & Team/Program:	Major Gifts, Philanthropy Group
Location(s):	Sydney or Melbourne
Manager Position Title:	Senior Philanthropy Manager
Manager's Name:	Veronica Pardey
Updated Version Prepared By:	Alison Barry, National Manager Philanthropy
Updated Version Approved By:	

Primary Purpose of this Position (<i>In one sentence - why does the role exist?</i>)
<p>The primary role of this position is to support the smooth running of day-to-day tasks and management to ensure a successful Major Gifts program and an enhanced donor experience across the entire portfolio including coordinating and managing own small pool of entry level major donors.</p> <p>Support areas include donor acquisition, growth and retention as well as assisting with all other major gifts responsibilities, such as processes and systems to support the Major Gifts team.</p>

Scope:	
Direct Reports to this Position	Indirect Reports
By Position Title	Total Number
Volunteers as required	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
<ul style="list-style-type: none"> • Admin support – revenue and growth • Maintain data integrity and input Accounts / Contacts and “donor moves” into CRM • Provide data analysis of donor giving. 	Supporting the Major Gifts team.

Other Dimensions of this Position
<p>Key activities include CRM database management, financial and general donor data reporting and some event coordination.</p> <p>This is an administrative, data entry, acquisition and stewardship process driven role and includes the responsibility of coordinating and managing a small pool of entry level donors. Attention to detail is crucial.</p>

Setting Priorities (<i>how is work prioritised</i>)	
How often does employee prioritise their own work?	Daily, weekly, monthly, annually as required.

How often does employee determine the priorities of others?	Daily and weekly, monthly, annually as required.
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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"> • National Manager, Philanthropy • Senior Philanthropy Manager • Philanthropy Managers • National Philanthropy Coordinators • Data & Insights Team • Communications team • Broader philanthropy team • Broader fundraising team • Communications and Events Teams • Marketing Team, including DDE and Supporter Care • BIS team • Finance Team
External	<ul style="list-style-type: none"> • Current and potential donors and High Net Worth Individuals • Trustee and philanthropic services companies, their philanthropic advisors and client managers • Wealth managers, solicitors, accountants • Philanthropic and networking organisations.

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

Decisions Expected <ul style="list-style-type: none"> • Prioritisation of workload • Plan approach and content for donor care portfolio • Plan and provide assessment for donor care portfolio
Recommendations Expected <ul style="list-style-type: none"> • Recommend process improvements within the position's realm of accountability. • Recommend improved data capturing to enhance analysis for the function.

Every Team Member at The Smith Family:

- Is expected to uphold The Smith Family Values and Culture.
- Understands and complies with the Child Protection Framework.
- Takes reasonable care for the health and safety of themselves and others.
- Understands and complies with the Workplace, Health & Safety Systems.
- Reports hazards and incidents and participates in risk management as required.

Key Responsibilities / Accountabilities:		
Major Area:	Administration	% of Job Total: 50%
<ul style="list-style-type: none"> • Provide administrative support to members of the Major Gifts Team such as establishing and managing meeting times, setting agendas, taking minutes and follow up. • Support the team in generating donor communications including distribution of donor receipts, thank-you letters, and other correspondence. • Be the first point of contact for incoming enquiries via philanthropy email inboxes and respond to or direct inquiries to appropriate Major Gifts Team member. • Contribute to accurate and consistent donor record keeping and management of team file systems both in the CRM Connect and SharePoint and other systems as required. • Assist with donor stewardship processes to support growth and retention targets including managing own small pool of entry level major donors across the entire portfolio. • Track and monitor the Philanthropy Team's income and expense budget as directed by the National Philanthropy Manager to inform planning and reporting including monthly CEO report and the endowment fund. 		
Major Area:	Data Analysis and Integrity	% of Job Total: 25%
<ul style="list-style-type: none"> • Contribute to consistent and accurate data entry by entering and updating relevant information into the CRM - Connect. • Advise and support Major Gifts Team Members to ensure all donor profiles are up to date and accurate in the CRM and to inform enhanced donor journeys, forecasting and reporting (e.g. Contacts, Opportunities, Instalments, Progress Reports and Activities). • Reconcile income received with CRM records against monthly financial actuals to inform accurate financial tracking and internal and external reporting. • Support the team with a set of reports on donor activity, giving, and stewardship "donor moves" to assist Major Gifts Team Members when managing their donors. • Provide analysis and segmentation of donor data to support donor moves, team planning and communications. • Support bulk data uploads and assist with CRM-related queries across the team. • Prepare donor profiles and assist with data-related briefs for Major Donor. 		
Major Area:	Events	% of Job Total: 5%
<ul style="list-style-type: none"> • Assist in the coordination and collection of collateral around bespoke major donor event such as identifying key invitees, managing RSVPs, and donor profiles. • Provide support in recording the post event attendance and meaningful interactions for Major Donors present at events. • Ensure all donor attendance and feedback is recorded in Connect to support continuous improvement in the donor experience and to inform future engagement practices. 		
Major Area:	Philanthropy Communication	% of Job Total: 10%
<ul style="list-style-type: none"> • Assist Philanthropy Team to create persuasive and compelling proposals, reports, and donor communications. • Support requests to the Communications team, including media opportunities, permissions for donors to be included in annual reports, and branding requests from funders 		
Major Area:	Sponsorship Administration & Retention	% of Job Total: 10%

- Work collaboratively with the National Administration team and Supporter Care Teams to support Major Gifts Team members in response to their requests when managing student sponsorship communications to donors, including student preferences, exits and renewals.
- Work with the Communications and Philanthropy team to ensure the annual Major Donor Appeals (Winter/Tax, Christmas, Back to School) are ready for distribution by Major Gift Teams Members in a timely manner and to reflect donor preferences.
- Assist with stewardship initiatives including donor recognition (e.g. thank-you letters, acknowledgments).
- Help collate and compile relevant program information and data for donor reports and proposals as requested by Philanthropy Team members.
- Gather and report on donor feedback to support retention efforts.
- Responsible for managing and stewarding a small pool of donors

Key Challenges in Achieving Goal(s): (What are the key challenges faced by this role in meeting goals/objectives)		
<ul style="list-style-type: none"> • Adapting to changing elements • Working in person and online with a cross-collaborative team in locations Australia wide 		
Qualifications, Experience and Competencies: (What background, knowledge, experience or competencies are required to perform the role at the expected level?)		
Education / Qualifications / Memberships:	Essential	Desirable
	<ul style="list-style-type: none"> • Qualification and or commensurate workplace experience in a similar role 	<ul style="list-style-type: none"> • Degree in Higher Education • Marketing Qualification
Experience:	Essential	Desirable
	<ul style="list-style-type: none"> • Fundraising or similar experience, with keen attention to detail • Two years plus working in the philanthropic, not-for-profit, Customer Service Relationship sector, and or similar sector • Excellent experience in Relationship management • Experience in CRM management • Can demonstrate experience or ability in budget monitoring • Can demonstrate experience in project coordination for small to medium size projects 	<ul style="list-style-type: none"> • Fundraising experience • Compelling writing skills • Prospect research • Data analytics
Competencies:	Essential	Desirable
	<ul style="list-style-type: none"> • Good written and verbal communications • An engaging and professional communications style • Strong analytical skills and the ability to grasp and interpret data quickly • Ability to problem solve • Time management skills and ability to work to deadlines • Ability to work with diverse stakeholder groups • Intermediate to Advanced knowledge of Microsoft Office suite • Excellent attention to detail • Flexibility • Resourceful • Efficient and effective 	