



NATIONAL TRUST OF AUSTRALIA (NSW) POSITION DESCRIPTION

Role:	Relationship Manager
Department:	Fundraising and Memberships
Primary Location:	National Trust Centre (NTC) Observatory Hill, Millers Point, Sydney
Reporting Manager:	Director, Development and Membership
Hours of work:	35 per week

Organisation Overview

The National Trust of Australia (New South Wales) is the State's largest community based conservation organisation. It operates a number of important house museums, galleries and gardens and manages a large collection of objects and archaeological artefacts.

The National Trust's role is defined by the *National Trust of Australia (New South Wales) Act 1990*.

- Vision:** To bring the heritage of NSW to life for future generations
- Mission:** **Advocate** for the conservation of built, cultural and natural heritage by engaging with the community and government.
Identify, conserve and protect our built, cultural and natural heritage by example, advice and support.
Educate and engage the community by telling our stories in ways that awaken a sense of place and belonging.
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Primary Purpose

The Relationship Manager is responsible for building and managing long term relationships with new and existing major donors and potential and existing bequestors, to achieve agreed income targets.

Working collaboratively with the Director, Development and Memberships, the role is also responsible for identifying and stewarding potential high net worth individuals, as well as writing high quality requests for funding, ensuring donors receive inspiring proposals and are well informed of the impact of their gifts.

Key Accountabilities

Working with high net-worth individuals (HNWI) and Bequestors, the Relationship Manager will be comfortable working within a Moves Management structure and be responsible for:

- *Account Management:* Managing a portfolio of Philanthropic donors to meet set KPIs, financial budgets and be a National Trust advocate at meetings and events.
- *Relationship Development:* Developing key relationship and ensuring philanthropy management plans are maintained.
- *Stakeholder Engagement:* Engaging with key stakeholders to bring together individuals and divisions to achieve strategic objectives.

- *Donor Engagement*: Developing a program of events for donor engagement, managing and engaging donors and moving them up the ladder of giving.
 - Exercising due diligence to ensure occupational, work health and safety risks are addressed.
 - Undertaking all other tasks and duties in consultation with the Director of Fundraising and Membership.
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Key challenges

Supporting the National Trust as a highly respected and recognised advocacy, conservation and educational body by:

- Ensuring donor relationships are maintained and appropriate levels of stewardship are achieved whilst exercising the highest levels of discretion, integrity and professionalism.
 - Building commercial opportunities to strengthen the revenue streams of the Trust whilst remaining true to the independence of the Trust.
 - Working across a diverse stakeholder group to deliver the Trust's priorities.
 - Maintaining high levels of personal enthusiasm, commitment to and involvement in the work of the Trust, including engagement in weekend and evening activities.
 - Willingness to travel to various regional properties.
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Qualifications

- Tertiary qualifications in Business, Arts, Marketing or a related field.
 - 5+ years of experience in fundraising, marketing, sales or public relations with experience in relationship building and demonstrated networking ability.
 - Sound knowledge of fundraising standards, principles, policies and procedures.
 - Exceptional communication skills, both verbal and written and the proven ability to close a deal Class C driver's license (occasional opportunities for travel to regional properties)
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Experience and skills

- A background in fundraising, marketing, sales or public relations with experience in relationship building and demonstrated networking ability.
 - Sound knowledge of fundraising standards, principles, policies and procedures.
 - Exceptional communication skills
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Key Result Areas

Resilience and Courage

- Be flexible, show initiative and respond quickly when situations change
- Remain calm under pressure and in challenging situations

Act with Integrity

- Represent the organisation in an honest, ethical and professional way and encourage others to do so, following the Trust's values and policies
- Act to prevent and report misconduct, illegal and inappropriate behaviour

Value Diversity and Inclusion

- Show respect for diverse backgrounds, experiences and perspectives

Communicate Effectively

- Communicate concisely and clearly with all stakeholders and maintain the goodwill of members, donors, volunteers and the broader community
- Present with credibility and engage varied audiences
- Write fluently and persuasively in a range of styles and formats

Commitment to Customer Service

- Provide customer focused services consistent with organisational values and objectives

Work Collaboratively

- Collaborate with internal and external stakeholders and value their unique contribution
- Facilitate opportunities to engage and collaborate with philanthropic donors to achieve objectives

Influence and Negotiate

- Gain consensus and commitment from others
- Engage senior management in philanthropy strategies

Deliver Results

- Achieve results through efficient use of resources and a commitment to quality outcomes
- Facilitate the running of all donor cultivation and stewardship events
- In conjunction with the Director of Development, deliver a diversified major gifts strategy which may include an annual patron program, major gifts and grants, Annie Wyatt Bequest Circle and planned giving from individuals, foundations and other potential sources

Plan and Prioritise

- Effective planning to drive strategic plans from ideas to reality
- Manage cultivation plans for major gift prospects and engage the Director of Development and Memberships in gift solicitation
- Continually research and develop plans to expand the National Trust Donor pool
- Devise, implement and deliver stewardship program activities, donor acknowledgement and effective reporting

Think and Solve Problems

- Think, analyse and consider the broader context to develop practical solutions
- Research and analyse giving trend information, identify interrelationships and make recommendations based on relevant evidence

Demonstrate Accountability

- Adhere to any relevant legislation and policies

Finance

- Report, monitor and deliver income targets
- Understand and apply financial processes to achieve value for money and minimise financial risk

Technology

- Working knowledge of the main software applications including Microsoft Word, Excel, Powerpoint and the Customer Relationship Management database; IMIS

Manage and Develop People

- Support the skills and capabilities of voluntary workforce to achieve optimum performance and benefits for the organisation and deliver results within the agreed timeframes

Optimise Business Outcomes

- Initiate and develop longer-term goals and plans to guide the work of the team in line with organisational objectives

It is not the intention of the position description to limit the scope or accountabilities of the position but to highlight the most important aspects of the position. Following consultation, the aspects mentioned above may be altered in accordance with the changing requirements of the role.

Approval Date: May 2022

If you understand the significance of heritage conservation, recognise the importance of an inclusive cultural community and value our natural environment, you have the values we're looking for. If you know how to translate these into actions that will deliver our philanthropy strategy, we want to hear from you.

We offer a flexible work environment and value the highest levels of professionalism.

You must be **fully vaccinated** and have the **right to live and work in this location** to apply for this job.

For a full position description: <https://www.nationaltrust.org.au/positions-vacant-nsw/>

To apply, submit your CV together with a covering letter addressing the key accountabilities to: hr@nationaltrust.com.au

Closing date: Sunday 24th July 2022