NATIONAL TRUST OF AUSTRALIA (NSW)
POSITION DESCRIPTION

Role: Membership Operations and Engagement Officer
Department: Development
Primary Location: National Trust Centre (NTC) Observatory Hill, Millers Point, Sydney
Reporting Manager: Director of Development
Direct Reports: n/a
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 museums and historic properties while also looking after a large collection of objects and archaeological artefacts.

The Trust is established and its role defined by the *National Trust of Australia (New South Wales) Act 1990.*

The Trust is committed to providing educational and cultural services that will enhance public knowledge and enjoyment of these resources.

Vision: To bring the heritage of New South Wales to life for future generations.

Mission: **Advocate** for the conservation of our built, cultural and natural heritage by engaging with the community and government.
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.

Primary Purpose

The role has a dual focus:

1. Responsibility for increasing our retention rate through the engagement and participation of members in the National Trust Membership program. Customer focused, the role involves emailing, calling, and writing to members.

2. The second element is the administration and management of data within the CRM system (iMIS), including recurring membership-based operations, reporting and data integrity.

Key Accountabilities

The position holder has responsibility for:

Membership Engagement

- Connecting and building partnerships with a wide range of organisations to deliver Membership benefits.
- Developing promotions to drive new membership acquisition.
- Supporting Membership communications for on-boarding new members and for running the multi-step renewal process.
- Supporting delivery of member, donor and Patron & Guardian events.
- Supervising and training volunteers who are telemarketing lapsed members.

Measurement and Tracking

- Tracking and reporting on acquisition and retention campaigns

Processing and Reporting

- Processing, receipting, recording and reporting of all philanthropic gifts to the National Trust through the CRM system (iMIS).
- Manage member and donor event registrations.

Database Operations

- Data processing, gift management and quality enhancements, ensuring at all times that data integrity is maintained.
- Data segmentation and list management for appeals and marketing activity.
- Collaborating with colleagues across IT and Finance to ensure data accuracy, best practice processes and relevant reporting.
- Administering database business rules to ensure changes are appropriate, approved, documented, shared with and adopted by users, and aligned with best practice.

Financial Management

- Maintaining accurate record keeping within iMIS.
- Reporting and analysing performance against objectives.

Key challenges

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

- Maintaining high levels of personal enthusiasm, commitment to and involvement in the work of the Trust, including engagement in weekend and evening activities.
- Juggling competing priorities.
- Maintaining high levels of accuracy and attention to detail at all times.

Qualifications

- Arts, Tourism or Business under-graduate degree with subsequent relevant experience; or an equivalent combination of relevant experience and/or education/training.

- Demonstrated experience with CRM systems within a Membership and/or fundraising environment.
- Demonstrated data analytical skills with a comprehensive understanding of data segmentation.
- Excellent organisational and time management skills, including planning, scheduling and reporting to deadlines.
- High levels of accuracy, with strong attention to detail.
- Capacity to think and work innovatively, effectively and flexibly in a multi-disciplinary team environment

Experience/Knowledge/Attributes
- Membership experience in a company, association or not-for-profit to deliver projects that drive member value and engagement.
- Technically competent with a minimum of 2 years' experience working with customer relationship systems.
- Results-driven, self-motivated, and passionate about working in not-for profit sector.
- Highly developed interpersonal and communication skills, including the ability to maintain relationships across organisational units.
- Excellent written and verbal communication skills, including the ability to effectively negotiate and influence while representing an organisation.

Key Result Areas

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

Act with Integrity
Represent the organisation in an honest, ethical and professional way and encourage others to do so.

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 donors, volunteers and the broader community.
- Present with credibility and engage varied audiences.
- Write fluently and persuasively in a range of styles and formats.

Work Collaboratively
- Collaborate with internal stakeholders and value their unique contribution.

Influence and Negotiate
- Ability to manage volunteer staff who assist with administrative tasks.

Deliver Results
- Deliver against Membership KPI's.

Plan and Prioritise

- Continually research and develop plans to expand the National Trust Membership acquisition and retention channels.

Think and Solve Problems

- Make recommendations to enhance the CRM system.

Demonstrate Accountability

- Adhere to any relevant legislation and policies.

Finance

- Manage donor and member processing and receipting.
- Manage quoting, payments and scheduling with campaign suppliers.
- Report and monitor the progress of income outcomes against targets.

Technology

- High level of competency using Microsoft 365 applications
- Past experience with Customer Relationship Management databases; iMIS or equivalent.

Data Analysis

- Forecast and budget for future projects and use analytical skills to interpret and report on results.
- Interpret reports to identify opportunities to increase revenue.

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: January 2023