



NATIONAL TRUST OF AUSTRALIA (NSW) POSITION DESCRIPTION

Role: Membership 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 Australia's leading heritage conservation organisation, a not-for-profit, community based charity in operation for more than 75 years. Our vision is to bring the heritage of New South Wales to life for future generations through advocating for the conservation and protection of our built, cultural and natural heritage.

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 customer relationship management system (iMIS), including recurring membership-based operations, reporting and data integrity.
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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 undertake telemarketing duties for 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).
- Managing 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 for appeals and marketing activity.
- Collaborating with colleagues across IT and Finance to ensure data accuracy, best practice processes and relevant reporting.
- Administering business rules to ensure database changes are appropriate, approved, documented, shared with and adopted by users, and aligned with best practice.

Financial Management

- Maintaining accurate record keeping within iMIS.

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 if required.
- Juggling competing priorities.
- Maintaining high levels of accuracy and attention to detail at all times.

Qualifications

- Arts, Tourism or Business under-graduate degree with 1-2 years part-time or full-time work experience.
- Demonstrated experience with high volume data entry and database management, preferably within a customer relationship system.
- Excellent organisational and time management skills, including planning, scheduling and reporting to deadlines.
- High levels of accuracy, with strong attention to detail and an ability to follow a process.
- Strong excel skills to at least intermediate level
- Capacity to think and work innovatively, independently and flexibly in a multi-disciplinary team environment

Experience/Knowledge/Attributes

- Technically competent with 1-2 years' experience working with databases (ideally customer relationship systems).
- Results-driven, self-motivated, and passionate about working in the 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.
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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 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.
- Comfortable in calling lapsed members to try and win them back.

Deliver Results

- Deliver against Membership KPI's.

Plan and Prioritise

- Ability to prioritise work and deliver to deadlines

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.

Technology

- High level of competency using Microsoft 365 applications
- High level of competency with Excel
- Past experience with databases ideally a customer relationship management system

Data Analysis

- 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: May 2023