



NATIONAL TRUST OF AUSTRALIA (NSW) POSITION DESCRIPTION

Role:	Philanthropy Officer
Department:	Marketing, Communications and Development
Primary Location:	National Trust Centre (NTC) Observatory Hill, Millers Point, Sydney
Reporting Manager:	Head of Development
Direct Reports:	Nil
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

This role is responsible for supporting the fundraising function through:

- Delivery of fundraising programs including the Regular Giving, Appeal and Bequest programs.
 - Coordination of donor services including oversight of philanthropic gift processing, analysis and reporting related to donors and event and relationship development activities as directed by the Head of Development.
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Key Accountabilities

The position holder has responsibility for:

- Working with the Head of Development, implement and deliver effective donor campaigns achieving set financial targets
 - Oversee the programs for Regular Giving, Appeals and Bequests
 - Deliver Donor, Patron and Bequestor relationship development and cultivation events
 - Overseeing the production of marketing and promotional collateral to support Development campaigns
 - Collaborate with colleagues across IT and Finance to ensure accuracy of recording and reporting of data
 - Donor administration including maintaining accurate record keeping within the Customer Relationship Management (CRM) database, in so far as the records relates to donors and prospects
 - Report against set KPIs for fundraising programs and analyse performance against targets
 - Undertaking all other tasks and duties as required by the Head of Development, of relevance to the role.
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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 occasional weekend and evening activities
- Managing competing priorities
- In 2024, working with the team to transition donor records to an upgraded CRM database.

Qualifications/Skills/Experience

- A tertiary qualification in Business, Arts, Marketing or Communications/PR or other relevant degree.
- Highly developed interpersonal and communication skills, including the ability to build and maintain relationships, both internally and externally
- Demonstrated experience in using and understanding a Customer Relationship Management system within a Membership and/or fundraising environment
- Strong organisational and time management skills, including planning, scheduling and reporting to deadlines
- Demonstrated event management skills
- Excellent written and verbal communication skills, including the ability to prepare reports and presentations
- High levels of accuracy, with strong attention to detail
- A history of being results-driven, self-motivated and passionate about working in not-for profit space
- An interest in or commitment to heritage/conservation.

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 Fundraising KPI's

Plan and Prioritise

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

Think and Solve Problems

- Make recommendations to enhance the Fundraising programs

Demonstrate Accountability

- Adhere to any relevant legislation and policies

Finance

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

Technology

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

Project Management

- Assist Head of Development with forecasting and budgeting for future events and 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: April 2024