

POSITION DESCRIPTION (PD) FOR PhO– VIC/TAS			
<i>All employees/workers within Catholic Mission must have a position description.</i>			
<b>Position Title (Generic):</b>	Officer	<b>Position Title (Specific):</b>	PhO(PHILANTHROPY OFFICER) – VIC/TAS
<b>Reporting to:</b>	Philanthropy Manager	<b>Direct Reports:</b>	None
<b>Position Location:</b>	Community Engagement for Reporting Melbourne Office for physical location If Other, please identify: <a href="#">Click here to enter text.</a>	<b>Position Code:</b>	PHILANTHROPY OFFICER-FT
<b>Full Time Equivalent (FTE):</b>	Full-time (37.5hpw)	<b>Date:</b>	21 Feb 2024
<b>Financial Authority:</b>	<input checked="" type="checkbox"/> Authority level to \$ 0 <input checked="" type="checkbox"/> Credit card to monthly cap of \$3000	<b>Rem Code:</b>	<b>GH</b>
		<b>Rem Steps:</b>	From: S25 To: S32
		<b>Award</b>	No Award - ACBC guidelines
<b>About Catholic Mission</b>	<p><b>Our Vision</b> That all may have life in Christ.</p> <p><i>“I came that they may have life, and have it abundantly.” (John 10:10)</i></p> <p><b>Our Mission</b> As the Pope’s international mission agency we respond to the call to love God and to love our neighbour by forming individuals and communities as missionary disciples of Jesus who share their faith in action and through prayer.</p> <p>We share in God’s mission to reach out, give life by sharing our personal and financial resources to:</p> <ul style="list-style-type: none"> <li>• proclaim the Gospel</li> <li>• serve people in need</li> <li>• act for peace, justice and creation</li> </ul> <p>in partnership with local churches so that all may have life in Christ.</p> <p><i>“Love one another. Just as I have loved you, you also should love one another.” (John 13:34)</i></p>		
<b>Purpose of Role</b>	<p>This role exists within the Community Engagement Unit of Catholic Mission (CM) but is located in our Melbourne Diocesan Support Office, supporting major gifts and gifts in Wills activities for Victoria (VIC) and Tasmania (TAS).</p> <p>The Philanthropy Officer (PhO) is responsible for identifying, nurturing, and growing the number of individuals, from mid-level donors to confirmed bequestors, as a part of our national Major Gifts and Gifts in Wills programs. The PhO will also work to establish philanthropic opportunities with trusts, foundations, and corporates to help sustainably grow income consistent with our values and goals for the VIC/TAS region.</p> <p>The primary focus of this role is:</p> <ol style="list-style-type: none"> <li>1. Program Coordination: work with the Philanthropy Manager (PhM) and the Diocesan Director (DD) for the Archdiocese of Melbourne, and other stakeholders to deliver two of CM’s main fundraising programs – Major Gifts and Gifts in Wills – within those dioceses.</li> <li>2. Growth: actively grow the number of major gifts and confirmed bequests.</li> <li>3. Engagement: nurture high value donors and bequestors, ensuring long-term interest in CM and continued support of our vision.</li> </ol>		

	<p>4. Connection: provide guidance and support to VIC/TAS Diocesan Directors (DDs) and collaborate with other CM staff to deliver the Major Gifts and Gifts in Wills programs.</p> <p>5. Improvement: look at new ways to strengthen and grow the Major Gifts and Gifts in Wills programs.</p> <p><b>Major Gifts and Gifts in Wills Programs</b></p> <p>CM’s Major Gifts and Gifts in Wills programs play a pivotal role in our Fundraising and represent almost 30% of total CM fundraising income. This role is essential in helping acquire, grow, and steward donors and bequestors for CM’s work, and to achieve CM’s mission.</p>
Primary Duties & Key Performance Indicators (KPIs)	
Key Responsibility Areas – Expected End Results	Key Performance Indicators (KPIs) – Measures of Success
<ul style="list-style-type: none"> <li>▪ Program Coordination</li> </ul>	<ul style="list-style-type: none"> <li>▪ Deliver CM’s Major Gifts and Gifts in Wills programs in Melbourne and other Dioceses within VIC/TAS.</li> <li>▪ Outwork the national gifts in Wills strategy to acquire, grow and retain bequestors, also identifying and nurturing prospects across the supporter base.</li> <li>▪ Outwork the major gifts strategy to identify, nurture and grow mid-level to major donors, including trusts and foundations.</li> <li>▪ Secure major gifts from individuals, corporates, and parishes, increasing income attributable to the activities of the PhO for projects, and sponsorships for events.</li> <li>▪ Work with the PhM to set, manage, and reach targets.</li> <li>▪ Support the preparation of budgets, and report against budgets monthly.</li> <li>▪ Share learnings or key takeaways with the provincial DD and relevant stakeholders across VIC/TAS who are responsible for delivering various elements of CM’s Major Gifts and Gifts in Wills programs.</li> <li>▪ Identify and interview confirmed bequestors for testimonials in donor newsletter, submitting articles ahead of deadlines for March, July, and December.</li> <li>▪ Follow-up all leads for bequests and major gifts immediately, regardless of source, journeying with supporters through their next steps and key decisions.</li> <li>• Keep accurate and up-to-date records in Customer Relationship Management (CRM) Database of all contact and activities with all mid and major donors, bequestors and prospects.</li> </ul>
<p>2. Growth</p>	<ul style="list-style-type: none"> <li>▪ Actively grow the number of major donors and confirmed bequestors through managing and nurturing existing relationships, as well as identifying, cultivating, and soliciting new relationships, including trusts and foundations.</li> <li>▪ Implement activities to convert gift in Will leads to a confirmed status.</li> <li>▪ Implement activities to grow major donors and income, including events.</li> <li>• Collaborate with PhM and social media admins to develop and implement awareness activities for prospects online, including digital campaigns specific to the Archdiocese of Melbourne.</li> </ul>
<p>3. Engagement</p>	<ul style="list-style-type: none"> <li>▪ Steward gift in Will supporters and donors effectively, ensuring long-term interest in CM’s mission and continued support of our mission.</li> <li>▪ Working with the PhM, develop and coordinate annual calendar of strategic engagement activities to grow engagement, including support of our bequest circle, the Society of the Little Flower.</li> <li>▪ Annual calendar of engagement activities to also include events as per below: <ul style="list-style-type: none"> <li>○ Supporting at least four annual events in the Archdiocese of Melbourne.</li> <li>○ Supporting at least one annual event in the following Dioceses: Hobart, Ballarat, Sandhurst and Sale for high value donors, bequestors, and/or corporates at key times of the year.</li> <li>○ Generate additional interest in and income for the work of CM.</li> </ul> </li> <li>▪ Implement donor care activities, including visits, calls, events, and letters to nurture key donor relationships and provide opportunities to meaningfully connect with donors, bequestors and prospects.</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Manage communication to major donors and bequestors that enhances engagement and commitment, including annual reports, birthday and Christmas cards, birthday calls, milestones and project proposals, updates, and final reports.</li> <li>▪ Engage donors in becoming mission aware and generally supporting the work of CM within the VIC/TAS region.</li> </ul>
4. Connection	<ul style="list-style-type: none"> <li>▪ Provide guidance and support to DD Melbourne and the other VIC/TAS DDs and collaborate with other CM staff to deliver both programs and help ensure, with the PhM and DD Melbourne, that they are equipped and trained to successfully outwork major gifts and gifts in Wills strategies in their dioceses.</li> <li>▪ Where possible, volunteer to deliver parish appeals within the Archdiocese of Melbourne.</li> <li>•</li> </ul>
5. Improvement	<ul style="list-style-type: none"> <li>▪ Work with the PhM, the DD Melbourne and the other VIC/TAS DDs to look at new ways to strengthen and grow the Major Gifts and Gifts in Wills programs throughout VIC/TAS.</li> </ul>
6. Comply with CM's Safeguarding of Children and Vulnerable Adults policy and code of conduct.	<ul style="list-style-type: none"> <li>• Comply with best practice for safeguarding children and vulnerable people in accordance with established laws, standards and organisation policy and procedures.</li> <li>• Breaches are identified and reported where appropriate, in order to eliminate or prevent the abuse of children and/ or vulnerable people.</li> <li>▪ For those in managerial or supervisory roles: Promote and implement safeguarding training (including induction and ongoing training), safeguarding practices and record-keeping within CM.</li> </ul>
7. Comply with Catholic Mission work, health and safety measures and standards.	<ul style="list-style-type: none"> <li>• Comply with best practice for safe work practices in accordance with established laws, standards and organisation policy and procedures.</li> <li>• Risks/hazards are identified and reported where appropriate, in order to eliminate or prevent the risk recurring.</li> <li>• Consultative processes provided by Catholic Mission are engaged.</li> <li>▪ For those in managerial or supervisory roles: Promote and implement workplace safety training (including induction and ongoing training), practices and record-keeping within CM.</li> </ul>

#### Challenges of the Position

- Building the major donor pipeline.
- Building the bequest base.
- Establishing connections with and securing gifts from corporates, trusts and foundations.
- Supporting regional Diocesan Directors within VIC/TAS.

#### Person Specification

Essential	<i>Knowledge</i>	Desirable	<i>Knowledge</i>
	<ul style="list-style-type: none"> <li>• Understanding of and commitment to Catholic principles, values and global mission.</li> <li>• Understanding and appreciation of the role of the Catholic Church in mission.</li> <li>• Understanding of the not-for-profit sector.</li> <li>• Understanding fundraising, major gifts and gifts in Wills solicitation and stewardship principles.</li> </ul>		<ul style="list-style-type: none"> <li>• Understanding of Catholic Church structure and culture.</li> </ul>

<b>Essential</b>	<b>Experience</b> <ul style="list-style-type: none"> <li>• Demonstrated achievement in the development and implementation of major gifts and/or bequest fundraising programs and activities including the development and use of networks OR equivalent experience in securing funds from high-net-worth individuals and/or business leaders in a commercial role.</li> <li>• 3-5 years of relationship-based fundraising experience and proven success in personally increasing major gift donations, bequests or high value sales OR equivalent experience in a comparative role in the corporate sector.</li> </ul>	<b>Desirable</b>	<b>Experience</b> <ul style="list-style-type: none"> <li>• Data mining and analysis and implementing findings to drive outcomes.</li> <li>• Coaching team members to help drive organisational outcomes and targets.</li> </ul>
<b>Essential</b>	<b>Skills</b> <ul style="list-style-type: none"> <li>• Ability and drive to conduct high volume of outbound supporter calls and visits in line with fundraising targets and KPIs. Be outcomes driven.</li> <li>• Event management and facilitation skills particularly concerned with fundraising and financial commitment events.</li> <li>• Self-directed and motivated with a disciplined and determined approach.</li> <li>• Exceptional interpersonal skills including an ability to establish rapport with donors, potential donors, bequestors, business executives and accomplished entrepreneurs, in addition to senior church leaders.</li> <li>• High level of efficiency, accuracy and attention to detail, particularly in relation to time management, multi-tasking, prioritising tasks according to level of importance.</li> <li>• High level of competency in use of computer applications such as MS-suite of products (Word, Excel and PowerPoint), use of email, use of databases (previous experience using iMIS is preferable).</li> <li>• Excellent written and verbal communication skills; notably comfortable and competent in public speaking.</li> </ul>	<b>Desirable</b>	<b>Skills</b> <ul style="list-style-type: none"> <li>• An ability to have conversations with people that inspire them to support our work, make them enthusiastic about the role they can play in Mission and move them to action, as financial partners.</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> All applicants must be eligible to work within Australia.</li> <li><input checked="" type="checkbox"/> A Criminal History Check is required for this position.</li> <li><input checked="" type="checkbox"/> A Working with Children Check is required for this position.</li> <li><input checked="" type="checkbox"/> This position requires occasional travel within the VIC/TAS region.</li> <li><input checked="" type="checkbox"/> Commitment to CM's agency requirements, including attendance at staff and management meetings; completion of all finance and operational reporting requirements as per CM's policies and/or line manager's directive, adherence to program, HR and Finance policies and procedures.</li> <li><input checked="" type="checkbox"/> You will receive a Mobile Phone Allowance of \$780pa (prorated if you work part-time).</li> </ul>		

	<input checked="" type="checkbox"/> Requires own car (will be reimbursed petrol). <input checked="" type="checkbox"/> Capacity to work outside standard business hours.
<b>Key Stakeholders/Relationships</b>	
<b>Internal</b>	<ul style="list-style-type: none"> <li>• Philanthropy Manager</li> <li>• Fundraising Manager</li> <li>• Diocesan Director - Archdiocese of Melbourne</li> <li>• Regional VIC/TAS Diocesan Directors</li> <li>• Melbourne Diocesan Support Team               <ul style="list-style-type: none"> <li>▪ National Office teams</li> <li>▪ Other PhOs CM</li> </ul> </li> </ul>
<b>External</b>	<ul style="list-style-type: none"> <li>• Catholic Mission donors, bequestors and prospects</li> <li>• Corporates</li> <li>• Schools</li> <li>• Parishes</li> <li>• Vendors and suppliers</li> </ul>

<b>PREPARED BY</b>		<b>REVIEWED BY</b>	
<b>Name</b>	Matthew Gibson	<b>Name</b>	Adrienne Williams
<b>Position Title</b>	Philanthropy Manager	<b>Position Title</b>	Community Engagement Director
<b>Date</b>	21/02/2024	<b>Date</b>	21/02/2024
<b>REVIEWED BY HR</b>		<b>AUTHORISATION: 1<sup>st</sup> Level</b>	
<b>Name</b>	Sharon Messina	<b>Name</b>	Peter Gates
<b>Position Title</b>	HR Director	<b>Position Title</b>	Deputy National Director
<b>Date</b>	21/02/2024	<b>Date</b>	21/2/2024