

POSITION DESCRIPTION (PD) FOR <b>Philanthropy Manager</b>			
<b>Position Title (Generic):</b>	Manager	<b>Position Title (Specific):</b>	Philanthropy Manager
<b>Reporting to:</b>	Interim Fundraising Manager	<b>Direct Reports:</b>	Philanthropy Officer x 5
<b>Position Location:</b>	(FR) Fundraising National Office If Other, please identify: <a href="#">Click here to enter text.</a>	<b>Position Code:</b>	PhM-FT
<b>Full Time Equivalent (FTE):</b>	Full-time=1.0FTE Fixed Term 13 months from 1 Apr 2025	<b>Date:</b>	3/02/2025
<b>Financial Authority:</b>	<input type="checkbox"/> Authority level to <a href="#">Click here to enter text.</a> <input checked="" type="checkbox"/> Credit card to monthly cap of \$2,000	<b>Rem Code:</b>	IR8
		<b>Rem Steps:</b>	From: S29 To: S37
		<b>Award</b>	No Award - ACBC guidelines
<b>About Catholic Mission</b>	Catholic Mission is the Pope's international mission agency in Australia. We partner with communities, helping them to flourish by supporting grassroots projects, including healthcare education, and faith formation, and being an active voice for human rights.		
<b>Purpose of Role</b>	<p>The Philanthropy Manager (PhM) is responsible for leading a team of Philanthropy Officers (PhO), developing strategies and outworking plans to identify, grow, and nurture the number of high value and major donors, as well as confirmed bequestors, as part of the Philanthropy program. The PhM is also responsible for establishing philanthropic opportunities with high-net-worth donors, trusts, and foundations.</p> <p>The primary focus of this role is:</p> <ul style="list-style-type: none"> <li>• <b>Program Management:</b> Develop, budget, and implement a strategy and engagement plan for existing and prospective high value and major donors, trusts and foundations, corporate donors, and bequests.</li> <li>• <b>Growth:</b> Actively grow the number and value of major gifts, confirmed bequests and trusts and foundations partnering with Catholic Mission.</li> <li>• <b>Engagement:</b> Nurture and steward supporters ensuring long term interest in and commitment to Catholic Mission.</li> <li>• <b>Connection:</b> Network with and initiate new contacts within the philanthropic sector.</li> <li>• <b>Improvement:</b> Actively pursue innovative ways to strengthen and our philanthropic programs, including review of internal processes and systems.</li> </ul>		
Primary Duties & Key Performance Indicators (KPIs)			
Key Responsibility Areas – Expected End Results	Key Performance Indicators (KPIs) – Measures of Success		
1. Program Management	<ul style="list-style-type: none"> <li>• Develop, budget, and implement a strategy and engagement plan for existing and prospective high value and major donors, trusts and foundations, corporate donors, and bequests.</li> <li>• Identify existing Private Ancillary Funds (PAFs), trusts, and foundations that Catholic Mission is engaged with, and explore ways to strengthen their support to increase the income and opportunities to advance the relationships further.</li> <li>• Working with the Interim Fundraising Manager (IFM), manage the implementation of the Trusts and Foundations Program and partner with an external agency to help shape the overall program, its development, key assets such as portals, and plan for any future resourcing requirements.</li> <li>• Develop the Gifts in Wills strategy to acquire, grow, and retain bequestors, researching external and internal trends which can affect the financial growth and sustainability of Catholic Mission's Gifts in Wills activities, and identifying prospects across the supporter base.</li> </ul>		

	<ul style="list-style-type: none"> <li>• Develop the Major Gifts strategy to identify, nurture, and grow high value to major donors, including high net worth individuals, trusts, and foundations. Research external and internal trends affecting the financial growth and sustainability of Catholic Mission’s Major Gifts activities.</li> <li>• Work with the IFM, PhOs, and Provincial Diocesan Directors (PDDs) to set, manage, and achieve program targets.</li> <li>• Establish and monitor KPIs for PhOs.</li> <li>• Work with the Salesforce Technical Lead and Data Analyst Lead to develop and optimise dashboards and reporting to support the internal visibility of programs, stewardship, and moves management.</li> <li>• Work with PhOs and DDs to identify and interview confirmed bequestors for testimonials in donor newsletters.</li> <li>• Manage the creative development and marketing of online and print collateral including advertisements.</li> <li>• Develop, execute, and monitor campaigns, ensuring appropriate reporting is developed and maintained to analyse the effectiveness of activities, offering recommendations to improve future campaigns e.g., Annual Appeal, supporter surveys, re-confirmation, and conversion campaigns.</li> <li>• Keep accurate and up-to-date records in the CRM of all contact and activities with all donors, bequestors, and prospects.</li> </ul>
2. Growth	<ul style="list-style-type: none"> <li>• Work with the IFM, PhOs and DDs to actively grow the number and value of major gifts and confirmed bequests through managing and nurturing existing relationships, as well as identifying cultivating, and soliciting new relationships, including high-net-worth donors, trusts, and foundations.</li> <li>• Work with the IFM to launch, guide, and optimise Catholic Mission’s grant writing capacity, sharing learnings from the Philanthropy team about engagement with existing and potential PAFs, trusts, and foundations that the organisation could consider engaging with.</li> <li>• Work with the IFM to establish, engage, and steward the gift seeking group to activate them as ambassadors for the organisation, and encourage them to financially support the work of the organisation.</li> <li>• Develop and implement activities to convert bequest leads to a confirmed status.</li> <li>• Develop and implement activities to grow the number of major donors, gifts, and income.</li> <li>• Identify new PAFs, trusts, and foundations that Catholic Mission can engage with, exploring ways to establish relationships and present cases for support to these entities to increase and further diversify Catholic Mission’s Fundraising revenue.</li> <li>• Implement propensity scoring and modelling to identify leads within the CRM for targeted calls and campaigns.</li> <li>• Research and develop creative ideas and campaigns to attract and grow support.</li> <li>• Plan and execute campaigns including briefings, training, engaging internal stakeholders, and managing external suppliers to ensure campaigns are delivered on time and within budget.</li> <li>• Collaborate with the Associate Director of Communications &amp; Digital (ADCD) to develop and implement lead generation and awareness activities for prospect online, including digital campaigns.</li> </ul>
3. Engagement	<ul style="list-style-type: none"> <li>• Work with PhOs and PDDs to steward bequestors and donors effectively, ensuring long-term interest and commitment to Catholic Mission and the continued support of our vision.</li> <li>• Develop and coordinate an annual calendar of strategic engagement activities for the PhOs, including support of Catholic Mission’s bequest society, <i>The Society of the Little Flower</i>.</li> <li>• Coordinate with PhOs and DDs to implement and optimise local and national donor care activities, including visits, calls, events, letters, print and online resources to nurture key relationships and provide opportunities to meaningfully connect with donors, bequestors, and prospects.</li> <li>• Manage communication to major donors and bequestors that enhances engagement and commitment.</li> </ul>

	<ul style="list-style-type: none"> <li>Coordinate with PhOs who have identified existing PAFs, trusts, and foundations that Catholic Mission can further engage with, to tailor an engagement plan and strategy to lift their giving.</li> </ul>
4. Connection	<ul style="list-style-type: none"> <li>Strategically engage in events and activities that lift the profile of CM and our programs.</li> <li>Lead and manage the PhOs, provide guidance and support to DDs, and collaborate with Catholic Mission staff and suppliers to deliver all aspects of the Philanthropy program.</li> <li>Conduct annual Performance and Development Reviews (PDR) and objective setting with PhOs, with quarterly performance conversations.</li> <li>Collaborate with diocesan and other staff responsible for donor relationships ensuring that they are equipped and trained to successfully outwork major gifts and gifts in Wills strategies.</li> <li>Work with the Salesforce Technical Lead and the Data Analyst Lead to identify and flag major donors, bequestors and prospects, record activities, and report on moves management.</li> <li>Deliver tailored engagement plans and proposals to PAFs, trusts, foundations, and members of the gift seeking group.</li> </ul>
5. Improvement	<ul style="list-style-type: none"> <li>Actively pursue new ways to strengthen and grow the philanthropic portfolio, including but not limited to opportunities with existing and new PAFs, trusts and foundations.</li> <li>Continually develop, implement, and monitor internal processes related to the programs.</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**

- Achieving best practice in major gifts and gifts in Wills, including nurturing existing and cultivating new relationships.
- Understanding and appreciation toward fundraising and best practice across Catholic Mission, especially amongst regional staff.
- Increasing strategic and operational use of the database for major gift and gift in Wills prospecting and stewardship
- Consistency in implementing the major gifts and gifts in Wills programs across Catholic Mission, including collateral.

**Person Specification**

<b>Essential</b>	<b>Knowledge</b> <ul style="list-style-type: none"> <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>	<b>Desirable</b>	<b>Knowledge</b> <ul style="list-style-type: none"> <li>Understanding of Catholic principles, values, and global mission.</li> <li>Understanding of Catholic Church structure and culture.</li> </ul>
<b>Essential</b>	<b>Experience</b> <ul style="list-style-type: none"> <li>Relevant fundraising, business, marketing, or sales qualifications and 4 years of experience.</li> <li>4 years of team lead or management experience with an emphasis people management and driving outcomes.</li> </ul>	<b>Desirable</b>	<b>Experience</b> <ul style="list-style-type: none"> <li>Experience in managing third party providers.</li> </ul>

	<ul style="list-style-type: none"> <li>• Experience delivering successful donor relationship outcomes.</li> <li>• A track record of effectiveness in achieving fundraising goals and targets.</li> <li>• Experience providing training and working successfully with others to achieve results.</li> <li>• Experience leading meaningful engagement activities including high-quality events and activities.</li> <li>• Experience with data mining and analysis and implementing findings to drive outcomes.</li> </ul>		
<b>Essential</b>	<b>Skills</b> <ul style="list-style-type: none"> <li>• Ability to gather market intelligence and best practice strategies from diverse sources and use this information for business benefit.</li> <li>• Be a team player with the ability to collaborate and lead the collaboration with and of others.</li> <li>• Have excellent program management skills across a broad stakeholder group including but not limited to – time management, organisational abilities (including setting priorities, establishing milestones, evaluation), following up and handling multiple tasks, data and trend analysis, problem solving, and decision making.</li> <li>• Learning mindset with commitment to bring best practice fundraising to Catholic Mission.</li> <li>• Have strong relationship, inter-personal, and communication skills including active listening.</li> <li>• Be self-directed and motivated with a disciplined and determined approach.</li> <li>• Be enthusiastic, resilient, adaptable, and energetic.</li> <li>• Have well-developed computer skills in business software and CRM applications.</li> <li>• Have an ability to work effectively under pressure with accuracy and to produce quality work.</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 both internationally and nationally.</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"/> If FTE (full-time equivalent) =1.0, you will receive a Mobile Phone Allowance of \$325.00pa.</li> <li><input checked="" type="checkbox"/> Capacity to work outside standard business hours.</li> </ul>		

<b>Key Stakeholders/Relationships</b>	
<b>Internal</b>	<ul style="list-style-type: none"> <li>• Community Engagement Director</li> <li>• Interim Fundraising Manager</li> <li>• Fundraising Team</li> <li>• Supporter Engagement Team</li> <li>• Diocesan Directors</li> <li>• Philanthropy Officers</li> <li>• Office Manager</li> <li>• Mission Formation</li> <li>• Programs</li> <li>• Communications</li> <li>• Finance</li> </ul>
<b>External</b>	<ul style="list-style-type: none"> <li>• Supporters</li> <li>• Suppliers/Contractors</li> <li>• Consultants</li> </ul>

PREPARED BY		REVIEWED BY	
Name	Matthew Gibson	Name	Adrienne Williams
Position Title	Philanthropy Manager	Position Title	Community Engagement Director
Date	31/01/2025	Date	3/02/2025
REVIEWED BY		AUTHORISATION: 1 <sup>st</sup> Level	
Name	Sharon Messina	Name	Peter Gates
Position Title	HR Director	Position Title	Deputy National Director
Date	4/02/2025	Date	7/02/2025
AUTHORISATION: 2nd Level			
Name	Brian Lucas		
Position Title	National Director		
Date	6/2/2025		