

POSITION TITLE: Head of Philanthropy and Relationships
DEPARTMENT: Public Engagement (PE)
DATE: May 2022
REPORTS TO: PE Director
DIRECT REPORTS: 2

Organisational Vision:

An inclusive world in which all people with disabilities enjoy their human rights and achieve their full potential.

Organisational Mission:

CBM is fighting to end the cycle of poverty and disability.

Department Objective:

By 2022, a more diverse and growing number of individual Australians and organisations are inspired to join with us in advancing the rights of people with disabilities in the poorest communities.

Purpose of Role:

The Head of Philanthropy and Relationships works closely with the PE Director, Senior Executives and other managers to develop and implement CBM Australia’s Philanthropic, Corporate and Major Donor Strategy to drive significant new revenue streams to support the growth of CBM Australia.

Level of Direction or Supervision:

Reporting to the PE Director, the Head of Philanthropy and Relationships operates at a senior level with responsibility for developing and delivering against objectives within the organisational and PE strategies.

Managing two direct reports, and with support from digital, marketing and fundraising this role will enable a relationship-focussed team to consistently meet or exceed income, awareness and engagement targets. The Head of Philanthropy and Relationships will be an effective and collaborative leader within the PE Team and contribute to the overall performance of the Department. This role builds successful relationships with other leaders and managers within CBM Australia, to ensure the right pitch is delivered to the right prospects (individual and organisational) to enable loyal connections to our cause and revenue raising.

Key Working Relationships:

PE Director, SMT, Head of Fundraising, Head of Experience, Head of Advocacy and Policy, Volunteers, ICT and CRM team, International Programs and Inclusive Advisory Group.

Key Tasks and Priorities:

Key Areas of Responsibility	Key Tasks	Performance Indicators	Weighting Total=100
Income generation and strategy	<ul style="list-style-type: none"> • Co-develop and implement a Strategy for Philanthropy and Corporate Partners. • On-time delivery of an accurate, fully-costed and justified Relationship roadmap, with rolling forward-view plans for Philanthropy and Corporate. These plans will also incorporate Major Donors and Gift in Will. • Drive and motivate the Relationships Team to achieve annual income, retention and growth targets. • Leverage opportunities to undertake strategic testing to increase income. • Strategic engagement with key internal and external stakeholders to assist with proposals, reports and implementation. • Promote engagement with Direct Marketing and other managers within PE. 	<ul style="list-style-type: none"> • Strategy developed, approved and implemented with quarterly reviews. • Annual income targets are met or exceeded in line with individual and team KPIs. • Annual plans and rolling view is approved for CBM Australia budget processes. • Rigorous review at key milestones is fully documented identifying areas for improvement /adjustment to the Philanthropy and Corporate Partner Strategy/plans and the teams' plans. • CRM, internal and external data optimally used to prospect, acquire, segment and plan. 	35%
Relationship management	<ul style="list-style-type: none"> • Manage a portfolio of philanthropic, corporate and major partners to increase income and engagement. • Support CEO and Senior Management Team engagement with philanthropic and major partners. • Manage the strategic implementation process for Relationship managers. • Manage all aspects of the gift cycle, including nurturing, stewarding and ask. • Develop and present professional and targeted proposals and packages based on CBM Australia's 	<ul style="list-style-type: none"> • Income meets or exceeds targets. • Effective scoping and delivery of all relationships. • Customer service orientation; relevant feedback is addressed in an appropriate and timely manner. • Engaging and activating journeys assured. • All donor engagement recorded in the CRM with data effectively updated, used and monitored. • Contact Centre meets KPIs and income targets. 	35%

	<p>International Programs and Inclusive Development services.</p> <ul style="list-style-type: none"> • Ensure the supporter journeys and reports are efficient and effective. 	<ul style="list-style-type: none"> • Ensure quality reporting, evidenced by feedback. 	
Philanthropic, Corporate and Major Partner communications	<ul style="list-style-type: none"> • Work with the PE team to drive the planning, creation and timely delivery of communications. • Ideate/deliver compelling philanthropic and major partners' retention communications. • Actively manage all resources to maximise impact and efficiencies. • Effectively manage internal stakeholder engagement with philanthropic and major partners, building capability and skills. 	<ul style="list-style-type: none"> • Communications are compelling and align with and exceed philanthropic and major partners' expectations. • A communications plan is developed and effectively implemented, with review and monitoring processes in place. • Activities are implemented in a timely manner to deliver agreed outcomes to budget. 	10%
Staff management and leadership	<ul style="list-style-type: none"> • Develop and deliver clear and actionable performance expectations, aligned with strategic indicators, targets and priorities, to the Relationships team. • Ensure all Direct Reports know specifically what is expected of them, and how their role contributes to other members of the team, the department and the wider organisation. • Create and foster a results-driven culture of professionalism, accountability, respect, innovation and continuous improvement that practices proactive problem solving and lives out CBM Australia's Values Statements. • Openly and honestly communicate and collaborate across PE and the broader organisation. • Coach/mentor staff to perform, achieve success, manage workloads, conflicts and stress. • Support and implement P&C processes and initiatives. 	<ul style="list-style-type: none"> • KPIs are set for each staff member and income is monitored against goals on a daily/weekly basis to drive an income focus. • Hold regular 1:1 meetings with Direct Reports. • Hold yearly and progressive staff performance reviews. • Direct Reports have the resources and training to support performance expectations. • A motivated and successful team is built and sustained that evidences a result-driven culture. • Leverage of resources is maximised to ensure optimal outcomes and efficiencies. 	10%
Finance, reporting and compliance management	<ul style="list-style-type: none"> • Deliver the Relationship team component of the PE budget. • Prepare comprehensive business cases to support new initiatives 	<ul style="list-style-type: none"> • Timely and quality delivery of inputs into strategic processes as required. 	10%

	<p>and investment, including but not limited to, 18-month rolling plans.</p> <ul style="list-style-type: none"> • Monitor and track budget and targets, to ensure success and strong reporting. • Manage and lead the direction of the team. • Support the implementation of the overall PE strategy. • Ensure all risk issues are identified, profiles are updated and strategies are developed to mitigate instances. • Ensure that all Relationship team activities are compliant with sector and legislative requirements. 	<ul style="list-style-type: none"> • Report monthly on the progress against risk, acquisition, engagement, income and targets. • Complete initiatives to standard, within budget and to agreed timeframes. • ACFID code, FIA, PCI, Privacy and other applicable legislation requirements are known, adhered to and monitored. 	
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SPECIFIC OUTCOMES REQUIRED
Philanthropic, corporate, major donors and bequests is a leading source of income for CBM Australia and potential donors and organisations seek out CBM Australia as an organisation to partner with
The Relationships Team consistently deliver and exceed strategies and targets
Effective management of a portfolio of new and existing individual philanthropic, corporate and major donor relationships results in substantial income growth for CBM Australia
Face to face relationships and supporter events are maximised to deliver future income
The Relationship Team is a high-performing fundraising team, operating professionally and to high-quality standards to achieve outcomes
Creativity and innovation is coupled with best practice strategies and principles to maximise income and results
All activities apply project management principles and techniques to ensure high-quality delivery on time and to budget
Results are tracked on a daily basis, with monthly and quarterly reporting enabling the team to be agile and responsive

PERSONAL ATTRIBUTES, COMPETENCIES AND QUALIFICATIONS
Demonstrated performance in philanthropic and relational fundraising, with qualifications in business, marketing or equivalent and at least seven years' experience
Skills and experience managing and securing diverse high value philanthropic and donor relationships to achieve and exceed targets
Ability to understand the varying needs and interests of the target organisations/donors to create sustainable and effective relationships, which yield results
Excellent understanding of general communications and fundraising fundamentals and channels, and ability to create compelling asks to secure gifts
Financially astute with sound judgement to manage budgets

Excellent relationship management skills with diverse internal and external stakeholders to deliver key outcomes
Proven track record in leading a high-performing team, with proven coaching and mentoring skills to drive success and build skills and capability
Demonstrated ability to work autonomously and as part of a team
Ability to critically analyse and interpret supporter data using a CRM system to identify trends and opportunities to drive outcomes
High level project management skills to deliver campaigns on time and budget and to high quality standards.
Ability to travel and work out of the office to interact and secure commitments from supporters
A solution focused approach to work with a 'can do' attitude, demonstrating initiative
Commitment to and ability to demonstrate and display CBM Australia's values and behaviours
A willingness to contribute to the growth and development of CBM Australia and its work

Terms and Conditions

General terms and conditions of employment are as per the CBM Australia General Enterprise Agreement 2015.

Performance Planning and Review

Performance planning and reviews will be carried out on a regular basis.

JOB EVALUATION		
Factor	Level	Score
Responsibility and Accountability	6	300
Judgment and Decision Making	5-6	142
Interaction and Influence	6	190
Knowledge and Application of Creative and Technical Skill	6	320
TOTAL		952
Salary Grading		Grade 12

Signed

Signed

Public Engagement Director

Head of Philanthropy and Relationships

Date

Date

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