

ENGAGEMENT AND CLIENT SERVICES LEAD

POSITION DESCRIPTION

Work type

Full-time / 0.8 (neg)

Location

Capital city preferable, flexible/remote working supported

Networks and residence in capital city outside of Victoria highly sought

Head office in East Melbourne

About us

Australian Communities Foundation (ACF) is a non-profit, intermediary foundation working with hundreds of everyday philanthropists to support structured giving, address social issues, and create positive, community-led change.

We are currently home to more than 450 funds and foundations led by families, individuals, giving groups, and corporate/NFP organisations across Australia.

In our 25th year, we have grown into one of Australia's largest community foundations with a unique national focus. Each year, we disburse more than 1,000 grants totalling more than \$20 million.

We foster a supportive, collaborative, values-led, and flexible team environment. You will have the opportunity to be involved in projects that make a meaningful difference to people and planet.

We believe in a fairer Australia – one where social, environmental and cultural justice is the norm – and if you want to join our team, you should too!

Our vision: Activate a nation of givers to create a fairer and more sustainable Australia.

Our role: As a broker of change, we enable, support and amplify giving.

Our promise: We are an organisation built on strong values, using capital as a means of achieving impact.

Our values: Inclusion, Agency, Courage and Fairness.

Position purpose

The Engagement and Client Services Lead reports to the Director of Engagement and Innovation, and supports the growth of the Foundation. By bringing in many first-time givers every year, this role enables and supports our vision for a fairer and more sustainable Australia, where more people give to positive social change.

The role leads all business development operations, introducing individuals, families, non-profits, like-minded groups and corporates to structured and strategic giving. This role also supports the Foundation's outreach to professional advisers and new client groups, and will be instrumental in further developing ACF's client services and relationship management. This role is also involved in the Foundation's national growth and, if located outside Melbourne, will represent ACF in a range of diverse ways.

The role is both operational and strategic in nature, developing new channels, services, and support systems.

Direct reports

Nil

Accountability

This position reports to the Director of Engagement and Innovation.

The successful applicant

As someone who is a leader and a people person, you are passionate about business development and customer service.

You thrive on holding positive and respectful relationships with people from diverse backgrounds and economic circumstances. You are equally professional and relaxed with high-net-worth clients and the family starting its giving journey; multi-national corporates and the micro for-purpose organisation.

You make genuine connections with (potential) donors and clients, and enjoy supporting them to make decisions regarding their giving, including matching them with the right products and services.

You are a clear and confident communicator who can explain structured giving in everyday language. You look forward to fielding daily enquiries of all kinds and providing prompt and engaging responses.

You are motivated by key points of interaction that add value and solve problems, including attending family or board meetings and writing proposals to assist people on their giving journeys.

You are a team player and understand that complex enquiries require teamwork to deliver the best outcome for the client.

You delight in building internal and external relationships, co-designing solutions with the client and our Philanthropic Services team and creating new products and services along the way.

You are keen to support the Director of Engagement and Innovation to grow new markets and channels nationally, introducing new customer segments with aligned customer relationships and helping build a seamless customer journey. You are also

motivated by supporting the Director of Philanthropic Services and the Director of Engagement to manage significant client relationships.

Key responsibilities

The primary responsibility of the Engagement and Client Services Lead is to manage all business development operations, introducing individuals, families, non-profits, like-minded groups and corporates to structured and strategic giving.

Other key responsibilities include:

- Managing the enquiry pipeline, working with the Communication and Marketing Team to grow it further, assisting each donor or client to find their giving solution.
- Delighting the clients in your portfolio with comprehensive support, ensuring agreed services are delivered to a high standard and new opportunities are developed.

Detailed responsibilities

Engagement

- Manage enquiries in a timely and professional manner, either responding personally or triaging amongst the wider team
- Ensure up-to-date and accurate information is held on all enquiries
- Progress prospects along their customer journey with appropriate follow-up, meetings, collateral and proposal writing
- Ensure full handover of new clients and donors to appropriate teams in Philanthropic Services
- Deliver routine and strategic enquiry reports and data
- Work with the Communications and Marketing Team and the Director of Engagement on campaigns, channel development and customer relationships, removing blocks in the customer journey and developing new services and collateral where appropriate
- Build ACF's national footprint with the Director of Engagement and Innovation and represent ACF to donors, clients and prospects in your home city if located outside Melbourne

Client services

- Report to the Director of Philanthropic Services and work with the Director of Engagement
- Manage assigned fund advisors and clients professionally
- Help support the development of client relationship management systems

- Develop community and values-aligned service integration for HNW and UHNW donors and clients
- Develop tailored packages for Trusts and Foundations (FFS clients)

Board and committee engagement

- Contribute to the creation and collation of quarterly Board reporting as requested

Other

- Represent ACF at sector and other relevant conferences and events, helping to build ACF's national profile outside Melbourne.
- Deliver all targets and strategic objectives assigned to the role in a timely manner
- Participate in team-wide activities and meetings as a senior leader
- Perform other appropriate work duties as required

Key selection criteria

- Ability to work independently, soliciting guidance and direction from appropriate Directors as required
- Outstanding interpersonal skills, diplomacy and political nous, with experience in customer relationship management
- Business development experience that is deeply aligned to purpose and wider social change
- Attention to detail, follow-through and working procedurally
- Excellent presentation and writing skills
- Competence with Microsoft Office
- Solid understanding of civil society, NFP sector and corporate CSR activity with philanthropic experience an advantage
- Ability to thrive and support others in a fast-paced and demanding but nurturing environment
- Ambition for, and experience in, leadership and management. A desire to progress through the organisation by delivering growth is an advantage.
- Ability to travel nationally

Team expectations

- Demonstrate ACF vision, values and culture in your daily work
- Take a proactive role in promoting equality and anti-discriminatory practice
- Be aware that you have a duty of care for the health and safety of yourself and others
- Assist in maintaining harmonious workplace relationships by openly and efficiently communicating with Board, staff, volunteers and external parties
- Be an active and supportive team member by demonstrating a willingness to help in all areas as required