

**JOB TITLE:** Executive Director Membership and Engagement

**LOCATION:** Melbourne or Sydney

**REPORTS TO:** CEO

**DIRECT REPORTS:** Directors of Engagement, WA/SA, NSW/ACT, and VIC/TAS, and Senior Director of Engagement QLD/NT.

#### **KEY RELATIONSHIPS**

- Manager – CEO
- Peers – Executive Director Business Services and Company Secretary, Executive Director Policy and Sector Development, and Executive Director Partnerships and Practice
- The Philanthropy Australia Board
- PA Members, Champions & Key Stakeholders

#### **ABOUT PHILANTHROPY AUSTRALIA**

Philanthropy Australia is the national peak body for philanthropy. We are an independent, not-for-profit organisation with more than 900 trusts, foundations, families, individual donors, professional advisers, companies, intermediaries and not-for-profit organisations as our members and partners.

We provide advocacy, networking, services, and resources to the philanthropic and not-for-profit sector, as well as information and research for the Australian community.

We are a growing movement of people and organisations who believe in the importance of giving and our members are proud to leverage their wealth and influence to create positive social change and community benefit. Our vision is for a generous and inclusive Australia. Our purpose is to inspire more and better philanthropy.

We support the wider philanthropic efforts of our membership through:

- Leading, advocating, and representing the philanthropic sector.
- Promoting the contribution of philanthropy by increasing understanding in the community, business and government.
- Inspiring and supporting new philanthropists.
- Increasing the effectiveness of philanthropy.
- Promoting strong and transparent governance standards in the philanthropic sector.
- Producing and distributing information to those seeking to understand, access, or partner with the philanthropic sector and to contribute to the growth of philanthropy and the philanthropic sector.

## **ROLE PURPOSE**

The primary purpose of this role is to lead and drive Philanthropy Australia's efforts to engage a larger and more diverse membership, to improve PA's value proposition for members and the services PA delivers, to inspire a more giving Australia and to foster more effective approaches to giving across the philanthropic sector as outlined in Philanthropy Australia's 2022-25 Strategic Plan.

As part of the Executive Leadership, the Executive Director Membership and Engagement will share their passion for philanthropy, linked with their understanding of membership organisations and provide the inspiring, strategic, and inclusive leadership needed to deliver on Philanthropy Australia's purpose and vision

## **KEY RESPONSIBILITIES**

### **Leadership**

- Lead and develop a focus on Member acquisition and engagement that is aligned with PA's purpose and strategy. This includes establishing and monitoring annual membership growth targets (recruitment and retention).
- Grow the influence and impact of Philanthropy Australia as a thought leader in philanthropy and the peak body including being visible as an influential and respected voice at key forums and across multiple mediums.
- Work with relevant Executive members to contribute to the development of a high quality and impactful organisation wide membership engagement program.
- Build relationships and identify potential strategic partners in collaboration with the ED Partnerships and Practice and the ED of Knowledge, Policy and Sector Development.
- Foster an internal culture that is collaborative, supportive and outcomes focused by demonstrating the values of the organisation as a senior leader
- Lead the design and implementation of future membership products and services across the membership, marketing, and practice teams.

### **Member Engagement Strategy & Implementation**

- Develop and implement a Membership and Engagement plan across the membership team to achieve PA's strategic goals.
- Establish and respond to annual membership growth and revenue targets (recruitment, retention, and diversity).
- Ensure a high-quality organisation wide Membership Engagement Strategy, including relevant level of programs and services for members is developed in collaboration with relevant ED's.

**POSITION DESCRIPTION**  
**EXECUTIVE DIRECTOR MEMBERSHIP AND ENGAGEMENT**



- Collaborate with the marketing and communications team on membership growth and services objectives and the development of content.
- Utilise PA's knowledge of the philanthropic sector to identify trends and changes in current and target membership market segments.
- Support the relevant Directors and Engagement Leads in the development of local membership engagement and networking opportunities.
- Evaluate and report on the delivery of the strategy and achievement of membership targets to the CEO, the PA Executive Team, the Membership and Engagement Committee, the Board and relevant external partners (e.g., funders).
- Oversee a successful and effective membership renewals program achieving forecast targets.

**Business Development**

- Partner with external stakeholders and identify business opportunities including the development of an effective portfolio of prospective members and supporters across individuals, corporations, and foundations.
- Leverage the CEO, Board and Executive as a resource to build new funder and member relationships.
- Develop and implement a national, multi-year membership plan for new member acquisition, retention, and upgrade.
- Monitor philanthropic trends, both nationally and internationally, identifying potential opportunities and service or program gaps that should be filled by Philanthropy Australia.

**Team Management**

- Provide a transparent, empowering and action-oriented approach to people management.
- Create a strong membership team culture aligned with PA's Values and Behaviours
- Provide day-to-day line management to the Directors of Engagement and support to other membership and engagement team members.
- Support the co-ordination, development and training of the team and provide ongoing career support and development for individuals.
- Champion the member voice, user experience and perspective within PA.
- Manage team workflows, ensuring each team member has clarity on their role and responsibilities.
- Ensure the CRM (Salesforce) and other systems are being effectively utilised to drive membership processes – including renewals – and provide value-added data to help inform the national membership strategy.
- Oversee financial monitoring and reporting of Membership and Engagement unit team budgets.

### **Executive & Professional Practice**

- Participate in Executive Leadership meetings providing input and advice on strategy, business development, advocacy, marketing, membership, and culture
- Submit Board Reports quarterly, manage tight national budgets, drive operational efficiencies and participate in Annual Work Plan and budget development
- Develop an annual plan and commit to key performance indicators to be monitored and assessed by the CEO; KPIs will initially relate to activities detailed in the Strategic Plan 2022–25, and then in the new Strategic Plan from 2025.
- Represent Philanthropy Australia including attending programs and stakeholder events, both interstate and after-hours as required
- Maintain effective links and relationships with relevant stakeholders in the philanthropic sector
- Maintain a current knowledge of national and international membership trends including marketing, digital and communication practices
- Agree to and abide by Philanthropy Australia's Code of Conduct living the Values of the organisation.
- Other duties as reasonably directed by the CEO in keeping with the skills and capabilities required of the role.

## **SKILLS & EXPERIENCE**

### **Qualifications**

- Tertiary qualifications in Business, Economics, Social Impact or relevant field

### **Experience**

- Inspiring and building a great team culture and contributing to the creation of a positive workplace culture across the organisation, through highly collaborative values-led leadership.
- Leading multi-disciplinary teams within philanthropic, not for profit, membership, or peak bodies, through strategic and results-oriented leadership.
- Building scale and delivering operational transformation (Desirable).
- Working within a membership structure (Highly Desirable)
- Developing and nurturing complex engagements with high-net-worth individuals and working in collaboration toward a mutually beneficially and ongoing relationship.

### **Skills**

- Demonstrable technical expertise across membership, marketing, communications, and business development in a philanthropic or grant-making environment.
- Strong budgeting skills, a proven ability to manage resources and work toward financial goals.
- Excellent interpersonal and stakeholder engagement skills with experience in building relationships with a range of types of stakeholders internally and externally.
- High emotional intelligence and proven ability to unite diverse teams to focus on a common goal to drive significant and membership engagement outcomes for the organisation.

## Our values and behaviours

### Respect

- We respect the inherent dignity of each and every human and each individual's skills, experience and contribution.
- We acknowledge the special connection of First Nations' Custodians to the lands and waters on which we work and pay our respects to First Nations Custodians and Elders past and present.
- We value when people give of their time, treasure, talent, and ties, to good causes.

### Impact

- We encourage philanthropy that makes a real and lasting difference by supporting organisations in their programs, capacity, and advocacy.
- We practice, and foster, collaboration as we build connections for greater impact.
- We encourage funders to be strategic, catalytic, and responsive to need in their giving.

### Trust

- We create welcoming environments that are safe, inspiring, and fun.
- We are caring and direct in our conversations, accountable for our decisions, and do what we say we'll do.
- We are committed to deepening trust between donors, service providers and beneficiaries.

### Celebration

- We promote the joy of philanthropy and profile inspiring philanthropy.
- We celebrate and build a culture of learning.
- We create space for all voices to be heard and celebrated.

### Humility

- We don't have all the answers and we look to learn from others.
- We grow from our mistakes and our vulnerabilities.
- We carve out time to be still and listen deeply.

### Sharing

- We practice, and encourage, the timely sharing of information, knowledge, experience, and expertise.
- We work as one Philanthropy Australia team with a shared commitment to our vision, purpose and values.
- We share our appreciation with those who support and enable our work.