

## Regional Council Portfolio Lead – Major Fundraising and Grants

### Position Description

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Position title	Portfolio Lead – Major Fundraising and Grants (Including The Rotary Foundation)
Location	n/a
Reports to	Regional Council Chair
Date	1 January 2024

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#### About the Regionalisation Pilot

The Regionalisation Pilot Vision is “to significantly increase the reach and impact of Rotary and Rotaract in Australia, New Zealand and the Pacific Islands.” Through this new model we seek to:

- Provide greater consistency and continuity of strategy across the zone.
- Enable a single point of contact for external parties seeking partnerships.
- Build a stronger, unified Rotary image and brand across the region.
- Improve efficiency to reduce duplication and costs to members and indeed to RI.
- Create attractive and diverse leadership and development opportunities.

Taken together, a new Governance approach will ensure we are able to provide greater support to clubs and members – to meet the goals of Rotary’s action plan, whilst providing more meaningful and rewarding club experiences for members.

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#### Position objective

A key objective of the Regionalisation Pilot Project is to ensure the Rotary Foundation (TRF) continues to be our charity of choice.

During the Regionalisation Pilot, the Foundation and its support structures will continue to operate under current arrangements. At this stage there will be no changes to how Clubs and members interact and give to the Rotary Foundation, or how District Grants are approved and disbursed. Global Grants will continue to be endorsed by the Governor and the District Foundation Chair.

The Portfolio Lead will work with the Zone 8 Regional Rotary Foundation Leadership team (RRFL) to examine how the TRF can leverage new opportunities created through the Regionalisation Pilot. This will include exploration of ways to engage governments, corporates and philanthropic entities to increase the TRF’s reach and impact.

The Regional Council Portfolio Lead for Major Fundraising and Grants has the responsibility to:

- Work with the RRFL and existing Rotary Foundation Leaders and District Rotary Foundation Chairs (DRFCs) to propose goals for TRF areas of focus, major programs within the region and other Rotary International global programs such as End Polio Now.
- Provide guidance and support to all operational and volunteer teams within Zone 8 on

TRF priorities, strategies and programs

- Recommend priorities and decision frameworks for Foundation grants
- Develop and successfully implement strategies for attracting major donors and corporate fundraising
- Recommend and encourage ongoing District and Club fundraising.

The Portfolio Lead must understand the diverse range of cultures and communities across the Zone, and to ensure Regional Council strategies and programs recognise and embrace these differences.

The Portfolio Lead will be assisted by a Portfolio Committee to provide advice and support to the Regional Council in order to ensure the Regional Council's vision is consistent with and aligned to global TRF programs and strategies.

The Portfolio Lead will also ensure that the collective voices of those managing The Rotary Foundation are communicated and taken into account when the Regional Council is considering matters relevant to the TRF.

The Portfolio Lead may be required to represent the Regional Council at Public Events.

The Portfolio Lead will ensure Rotary & Rotaract Clubs in Zone 8 are well educated and knowledgeable about TRF goals.

### **Key Responsibilities**

1. Work with the RRFL to identify and develop opportunities for promoting TRF in the Zone.
2. Effectively promote TRF across the Zone through good communications across a number of means
3. Collaborate with stakeholders across Zone 8 working effectively with people from diverse cultures and backgrounds, value different perspectives, and leverage the strengths of a diverse group to achieve planned outcomes for the Foundation.
4. Provide the Council with accurate, reliable, and timely data relating to the performance of TRF to enable Regional Council members to make sound policy and financial decisions.
5. Manage and report on the financial aspects of TRF, as agreed in a timely manner ensuring compliance and reporting requirements are completed on time as per Rotary International guidelines adhering to all agreed RI Policies
6. Provide guidance and support to all operational and volunteer teams within Zone 8 on TRF priorities, strategies and programs.

### **Person specification**

A Rotarian or Rotaractor from a club in Zone 8 in good standing, with high levels of ethics and integrity.

Be eligible for appointment as a Company Director under Australian Corporations law.

#### **Experience:**

Expertise and experience or a relevant background to focus on leading the Regional Council's work on major fundraising, grants and the work of the TRF across Zone 8.

Demonstrates extensive relationship skills and experience which will facilitate effective working relationships with Rotarians, Rotaractors and external partners at all levels across the Zone.

Can identify key areas requiring change and recommend sustainable solutions.

Experience in reviewing programs and identifying new opportunities for broader engagement.

Knowledge and understanding of the role of the Regional Council, and the relationship between the Regional Council and the Portfolio Lead's area of responsibility.

### **Skills**

Excellent leadership and Influencing skills.

Can demonstrate the ability to identify and inspire new groups and audiences to join with and support Rotary in the region.

Well-developed people skills, embracing collaboration and teamwork to build diverse and inclusive environments, and with the ability to manage conflict resolution.

Exhibits a positive and proactive attitude – is flexible and action focused.

Proven ability to plan, develop, implement, and evaluate strategic objectives including risk management and uncertainties.

Appreciation of the issues and challenges likely to be faced by Rotary across Zone 8, including the many cultural and linguistic communities in the Zone 8 Region

Effective communication skills, both written and oral.

### **Qualifications**

Relevant experience that clearly demonstrates the ability to engage, develop, and deliver Regional Council strategies for promoting major fundraising, grants and the TRF in the region.

## Selection Criteria Portfolio Lead – Major Fundraising and Grants (including The Rotary Foundation)

### Your Application

It is important that within your application you highlight how you meet the selection criteria and how your experience and skillset would enhance you as an applicant for the role described in the Position Description. In addressing the criteria:

- Give examples where as a director / committee member you have led initiatives that shows effective, innovative, and inspirational leadership.
- Describe your capacity to meet the needs of the role working alongside others in collaboration, as a leader and as a peer.

Please also provide a background CV with relevant educational and professional experience.

### Your Role and Experience

- As a Rotarian or Rotaractor you have been within Rotary for no less than 4 years and are supported by your Club President as a member of good standing.
- You have a willingness to serve in a voluntary capacity as Portfolio Lead – Major Fundraising and Grants (including The Rotary Foundation) for two years and with the opportunity to stand for election within the role for a further two years.
- You have a good understanding of the role and operation of The Rotary Foundation and its support structures at Zone, District and Club levels.
- You have held a board/committee position at Club or District level.

### Your Abilities

- You are able to lead and influence a group of volunteers to achieve the direction and outcomes sought to be achieved by the Regional Council and The Rotary Foundation across Zone 8, bearing in mind the differing community, cultural and languages across the region
- You have skills or experience from your business or professional background that enhance your ability to achieve the outcomes of this role.

### You can Successfully

- Lead the Regional Council's work with the Zone 8 Regional Rotary Foundation Leadership team to grow The Rotary Foundation and promote major fundraising and grants across the region
- Ensure Rotary & Rotaract Clubs in Zone 8 are well educated and knowledgeable about The Rotary Foundation
- Support the management of resources (including budgeting) as required