

POSITION DESCRIPTION

Position Title:	Fundraising Data and Donor Specialist
Reports To:	Fundraising Manager
Responsible for:	No direct staff reports
Date created:	October 2021

Te āhua o te tūranga - The nature of the position.

A new position to primarily oversee the donor database for the Division with a focus on improving data capture and data health, as well as supporting fundraising activities and donor care across the Division.

Ngā Hononga- Key Relationships.

- Fundraising team (National and Divisional)
- Divisional centre staff
- Business services team
- Donors
- Business Community
- Service Groups
- External funding agencies and service providers

Mahi noho haepapa - Key Accountabilities.

- To work with key staff to ensure the CRM system is streamlined, accurate and efficient to manage the processing of fundraising income
- To work closely with the Fundraising Manager and other team members to develop the capabilities of the CRM, e.g. inclusion of grants, events, bequests, regional donations, and fundraising (including community fundraising)
- To work closely with the accounts team to provide reports to enable general ledger entry of fundraising and donor monies received from multiple sources, including website, peer to peer platforms, direct credits etc.
- To administer the receipting process for donations and fundraising income.
- To run appropriate reporting and analytics from the Fundraising CRM
- To be the primary point of contact for the Division's donors and supporters to ensure a continued relationship with the Cancer Society, including answering queries and responding to donors, to assist with their donor journey.

The key accountabilities of the role may change from time to time so that the Cancer Society, Canterbury-West Coast Division is able to adapt to changes in the business environment

Mahi Mātua - Key Tasks.

Database Management	<ul style="list-style-type: none"> ▪ Identification and escalation of data/database issues ▪ Development and implementation of new features & procedures ▪ Maintaining data integrity and sound attribute structures to craft easy data retrieval and analytics ▪ Maintain record of all operating queries and their purpose ▪ Providing metrics and analysis ▪ Database management & hygiene ▪ Creating and establishing new projects/procedures ▪ Assist with fundraising dashboard/Divisional reporting
Individual Giving	<ul style="list-style-type: none"> ▪ Appeals - Quarterly & Acquisition - donation processing & receipting ▪ Individual Giving Income - donation processing & receipting ▪ Regular Giving Income and donor acquisition data management ▪ Regular data upload of all recruited regular givers ▪ Creating communications datasets
Campaigns	<ul style="list-style-type: none"> ▪ Maintaining campaign and segmentation tracking capability and nomenclature ▪ Analytics and statistical tracking of all campaigns ▪ Campaign reporting for Board Reports
Community Fundraising Events	<ul style="list-style-type: none"> ▪ Generating datasets for event communications ▪ Providing event based financial analytics and assisting with income enquiries/reconciliations ▪ Setting up comprehensive community fundraising/event architecture in database ▪ Providing training & support in database ▪ Assisting in event-based communications ▪ Assisting in establishment/integration of P2P platforms ▪ Regular data upload from all operating P2P platforms
Website	<ul style="list-style-type: none"> ▪ Online donation and giving management ▪ Regular data upload from website
Divisional Centre Teams	<ul style="list-style-type: none"> ▪ Loading all centre donor & financial data into database ▪ Provide statistics/insights/reports to Centre Managers ▪ Providing initial database training and subsequent support for centre managers and relevant staff ▪ Implementing procedures for accurate processing & recording of centre income
Bequests/Major Gifts & Grants	<ul style="list-style-type: none"> ▪ Income processing and receipting ▪ Data entry and maintenance ▪ Providing communication datasets ▪ Statistical analysis ▪ Setting up more comprehensive bequest/grant architecture in database ▪ Providing training & support in database
Finance Team	<ul style="list-style-type: none"> ▪ Communicating and working with the finance team to ensure fundraising and donor data can be allocated into the General Ledger in a timely and accurate manner ▪ Assisting with income enquiries/analytics ▪ Monitoring accuracy between database and accounting systems

	<ul style="list-style-type: none"> ▪ Working towards greater digitisation of data input and reconciliations ▪ Creating more unity & automation between accounting software and database
Other	<ul style="list-style-type: none"> ▪ Benchmarking Reports ▪ Contribute to the requirements of the National Fundraising Network eg Daffodil Day reporting ▪ Other tasks as requested

Health and Safety

- All staff have individual responsibility for Health and Safety.
You must:
 - Take reasonable care of your own health and safety
 - Take reasonable care your acts and omissions do not adversely affect the health and safety of others
 - Comply with any reasonable instruction
 - Co-operate with reasonable policy and procedures
 - Promote and participate in matters relating to health and safety
 - Identify and raise with management areas and methods to increase work health and safety.
- You may refuse to undertake unsafe work if you believe that carrying out the work would expose you, or any other person, to a serious risk to you or another person's health or safety arising from an immediate or imminent exposure to a hazard. You must immediately discuss your concerns with your manager or Health and Safety Representative.

Ngā tino pūkenga/whēako - essential skills/experiences for the role

- Well-developed data entry skills.
- Experience with an organisational CRM, preferably with a fundraising CRM
- Be inquisitive and think laterally to resolve problems.
- Experience with data analysis, reporting and presentation.
- Experience in understanding and driving process improvement.
- Enjoys working with people, easily establishes rapport and maintains positive and respectful working relationships.
- Methodical approach to work with the ability to initiate, implement and complete tasks to a high standard and with minimum supervision
- Ability to multi-task across a range of activities
- Lateral, innovative and creative thinking, demonstrable initiative
- Excellent communication skills, ability to mix and work with a wide range of people, confident and friendly in approach
- Ability to prioritize, meet deadlines and work under pressure
- Data importing and mapping experience
- Advanced Excel and quantitative analytical skills
- Proven track record in an administrative role.
- Patience and understanding when dealing with donors.
- Appropriate telephone manner.

Key Competencies

- **Communication** - able to communicate clearly and effectively and relates well to a wide range of people in both oral and written format and excels at listening effectively.
- **Planning and Organisation** - effective planning and organisation of initiatives via implementation of the correct sequence of actions.
- **Initiative** - Takes responsibility for own actions and makes decisions without referring to others. Seeks opportunities to improve work procedures.
- **Quality Focus** - Committed to achieving and maintaining quality standards which are relevant and positive for the organisation.
- **Attention to Detail** - completes all tasks with attention to accuracy and quality of output.
- **Flexibility** - able to adapt approach and plans to fit with changing conditions, tasks, responsibilities, or people.
- **Analytical Skills** - ability to apply and objective, logical reasoning process to develop a recommendation or conclusion.
- **Action/Achievement Orientation** - previous history of successfully delivering on multiple projects and objectives within agreed timeframes.

Level of Authority

As defined by the Cancer Society, Canterbury-West Coast Division's Budgets and Delegated Financial, Operational and Staff Authorities.

Authorisation of Position Description

Authorised by: Heather Locke, Fundraising Manager.

Signed by:

(Name of position holder)

Date: