

## ***Job Description***

**Title:** Individual Giving Manager

**Responsible To:** Manager, Fundraising

**Date:** Updated April 2019

**Location:** Domain Lodge  
1 Boyle Crescent, Grafton

**Reports:**  
**Direct Mail Officer**

### **Functional Relationships:**

Fundraising Team  
Marketing & Communications Manager  
Manager Supportive Care  
Manager Health Promotion  
Manager, Reception – Domain Lodge  
External suppliers

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### **Key Purpose**

To manage and oversee all aspects of Individual Giving portfolio including; direct mail, regular giving, and driving a pipeline to major gift and bequest prospects.

To grow the existing donor acquisition, conversion, retention and upgrade strategies and secure and manage necessary external supplier relationships.

### **Position Objectives**

- Increase net income via direct marketing, donor conversion activities (e.g. to monthly giving programmes) and donor stewardship and retention strategies.
- Manage the acquisition of 3000 new donors each year from Auckland/Northland region.
- Implement effective donor pathways.
- Implement effective monthly reporting that tracks all relevant targets and trends in the Individual Giving Programmes.
- Manage the Direct Marketing Officer
- Underpin the pipeline for mid donor, major donor and bequest prospect development.
- Manage external suppliers appropriately and in accordance with industry best practice standards.

### **Key Responsibilities, Tasks, and Performance Indicators**

#### **1. Donor Communications & Direct Marketing**

**Create and implement an annual programme of activity to raise funds from individual donors in support of CSAN services**

- Create and implement an annual calendar of activity within agreed budget plans.
- Liaise with Manager Fundraising in relation to the development of long-term, effective donor acquisition strategies and implement these strategies within the Individual Giving portfolio.

- Collaborate with the wider fundraising team to identify and develop opportunities to build support for Individual Giving programmes across other fundraising portfolios.
- Manage the development of campaigns from initial concepts and brief through to post campaign analysis, involving managing project schedules, training fundraisers, developing fundraising products, messages and materials.
- Liaise with the marketing team to better understand donor interests and motivations and to source and develop campaign messages and case studies.
- Manage relationships with external agencies.
- Develop donor profiles and segmentation to target specific groups.
- Use Raiser's Edge effectively to monitor and manage fundraising appeals, campaigns communications and reporting.

**Develop a Stewardship Plan that seeks to engage and retain donors and increase giving over time**

- Create an effective Stewardship Plan for donors within Individual Giving programmes
- Link donors and their importance to the people CSAN seeks to serve, and to the way CSAN meets the needs of people on a cancer journey
- Develop and implement ways to say thank you, with appropriate timing and asks to increase donor giving

**2. Staff Management**

- Maintain appropriate levels of supervision of staff.
- Ensure adherence to CSAN's policies and procedures.
- Conduct coaching, feedback and appraisal of line managed staff.
- Ensure staff are selected within criteria for role.
- Evaluate regularly and provide feedback on performance and appraisal.
- Provide necessary training and support.
- Provide clear expectations and monitoring.

**3. Data Management, Analysis & Reporting**

**Provide timely reporting to Manager Fundraising on all current programmes, annual trends, and recommendations for future projects**

- Liaise with the Database Manager to ensure effective information is provided so that data processes and structure in relation to Individual Giving fundraising and stewardship portfolio are developed and maintained
- Liaise with the Database Manager to develop reporting and analysis tools relevant to Individual Giving programmes including reports specific to the key areas of Income & Expenditure, Donor Retention & Stewardship, Donor Conversion and Donor Acquisition
- Provide ongoing reporting to the Fundraising Manager across the Individual Giving fundraising and stewardship portfolio. Flag variances/discrepancies against budget & KPIs.
- Apply robust analysis and reporting to influence future strategy
- Research external benchmark information to supplement discussion and decisions on future strategy

**4. Innovation**

**Introduce well researched and robust new ideas, methods, programmes and campaigns, designed to increase the number of active donors, increase net income over time and improve efficiency across the portfolio**

- Identify, research and assess opportunities to improve current practice and initiate new programmes across the Individual Giving portfolio with a view to improving overall results

- Make recommendations to Manager Fundraising in relation to implementing ideas, programmes and campaigns.
- Take a lead role within the Individual Giving portfolio to ensure best practice and effective management of the portfolio.
- Liaise regularly with the Marketing & Communications Manager to ensure best application of brand guidelines.

## 5. Administration & Reporting

**Ensure all administrative processes are documented and used effectively.**

- Use Raisers Edge as the primary information tool, ensure appropriate SOP's are adhered to, and inform Database Manager of any necessary updates
- Attend team meetings regularly and assist other team members from time to time as may be required
- Provide necessary reports and meet regularly with Fundraising Manager as required.

## PERSON SPECIFICATION

### Skills, Qualifications and Experience

- Minimum four years fundraising experience, with direct marketing and donor communications essential, with proven results.
- Strong analytical skills
- Excellent written and verbal communication skills
- Skilled in Raisers Edge software, or similar programme
- Good working knowledge of Word, Excel, Outlook, PowerPoint & Publisher
- Effective time management and project management skills; able to multi-task
- Proven ability to think strategically, but also master operational plans
- Ability to achieve deadlines a must

### Essential Personal Competencies

- **Strategic thinking:** able to translate the operational objectives to the achievement of strategic goals
- **Autonomy:** Functions independently when required
- **Initiative:** Evaluates situations and seeks practical solutions
- **Planning and organisation:** Effectively and efficiently plans work and organizes time
- **Professionalism:** Takes responsibility for ongoing learning and performance
- **Relationship Management:** ability to build and maintain strong working relationships

### Behavioural Expectations

The following behaviours are expected of all staff working for the Cancer Society. The competencies will be used during annual assessments to support assessments and evaluate the personal impact of the individual on the role and organisation:

<b>Planning and organising</b>	<ul style="list-style-type: none"> <li>• Sets practical and realistic goals</li> <li>• Identifies and uses effective processes and procedures for managing work</li> <li>• Effectively manages his/her time</li> </ul>
<b>Interpersonal communication</b>	<ul style="list-style-type: none"> <li>• Uses appropriate language in interactions with others</li> <li>• Listens to others</li> <li>• Is truthful and constructive in his/her communication</li> </ul>

	<ul style="list-style-type: none"> <li>• Does not engage in rumours or malicious gossip</li> </ul>
<b>Resilience</b>	<ul style="list-style-type: none"> <li>• Has a positive attitude toward work</li> <li>• Consistently behaves in a professional manner regardless of circumstances</li> <li>• Takes steps to recover quickly from disappointments and setbacks</li> </ul>
<b>In depth problem solving</b>	<ul style="list-style-type: none"> <li>• Considers many sources of information</li> <li>• Evaluates information in an objective manner</li> <li>• Carefully deliberates before a final decision is made</li> <li>• Assists with solutions to problems and consults with appropriate other parties when seeking solutions</li> <li>• Obtains authority prior to implementation of solutions</li> </ul>
<b>Delivering quality results</b>	<ul style="list-style-type: none"> <li>• Works efficiently and effectively at all times</li> <li>• Is flexible in approach to work and problem solving</li> <li>• Is dependable and responsible in practise and in reporting information</li> </ul>
<b>Policies, processes and procedures</b>	<ul style="list-style-type: none"> <li>• Follows the guidelines, procedures and rules set by the Cancer Society of New Zealand, Auckland Division</li> <li>• Maintains professional boundaries</li> </ul>
<b>Safety</b>	<ul style="list-style-type: none"> <li>• Is familiar with and consistently implements safe professional practice for self, colleagues and clients and their families</li> <li>• Adheres to Health and Safety regulations for self, colleagues and client and their family</li> <li>• Takes personal responsibility to bring own health or stress-related issues to the attention of MF</li> </ul>
<b>Integrity</b>	<ul style="list-style-type: none"> <li>• Is ethical and honest in all dealings with people</li> <li>• Is fair in expectations of others</li> <li>• Delivers on promises</li> </ul>
<b>Continuous improvement</b>	<ul style="list-style-type: none"> <li>• Seeks opportunities to improve organisational and work practices</li> </ul>
<b>Continuous learning</b>	<ul style="list-style-type: none"> <li>• Identifies own personal development needs</li> <li>• Takes steps to improve knowledge, understanding, abilities and skills</li> <li>• Identifies and communicates opportunities to improve organisational processes</li> </ul>
<b>Conflict management</b>	<ul style="list-style-type: none"> <li>• Tries to understand issues from all perspectives</li> <li>• Is objective and fair in analysis of issues</li> <li>• Is tactful and considerate of others</li> <li>• Informs MF of conflicts and disputes in a timely manner before they have a negative impact</li> <li>• Actively works to minimise conflict and deals with any that might arise in a professional and open manner</li> </ul>
<b>Respecting diversity</b>	<ul style="list-style-type: none"> <li>• Respects all people, regardless of gender, race, status, place of origin of other source of difference</li> <li>• Is open to learning and respects differences among people</li> <li>• Evaluates people on the basis of objective rather than subjective information</li> </ul>
<b>Teamwork and collaboration</b>	<ul style="list-style-type: none"> <li>• Builds and maintains cooperative work relationships with others, both inside and outside of Cancer Society New Zealand, Auckland Division</li> <li>• Deals with disagreements in an open, professional and non-threatening manner</li> <li>• Contributes ideas and suggestions to the team</li> <li>• Does not talk about other team members in a negative way</li> <li>• Speaks out on ways to improve team performance</li> </ul>

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