



# Position Description

## Individual Giving Officer

Wesley Fundraising  
February 2023

### Agreement

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Signed – Manager

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Signed – Employee

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Date

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Date

**Do all the good you can**  
because every life matters



# Individual Giving Officer

## Wesley Fundraising

### 1. Overview of Wesley Mission

Wesley Mission is a Christian organisation that has been caring for people for over 200 years, continuing the work of Jesus Christ in Word and deed.

#### 1.1 Our Vision

“Do all the good you can, by all the means you can, in all the ways you can, in all the places you can, at all the times you can, to all the people you can, as long as ever you can”.

#### 1.2 Our Mission

Continuing the work of Jesus Christ in Word and deed.

#### 1.3 Our Values

Out of Christian love and compassion we are driven by:

- Christlike servanthood
- unfailing integrity, and
- courageous commitment.

The organisational plan is based on four key result areas, namely:

- our clients
- our people
- our operations
- our financials.

Our position descriptions and performance plans are aligned with the key result areas.

### 2. Overview of Wesley Fundraising

The operational work of Wesley Mission includes a portfolio of community service activities that is diverse and constantly changing. The role of Wesley Fundraising is to:

- raise funds to support the activities of Wesley Mission
- support Wesley Mission services and centres with specific-purpose and local fundraising activities
- acquire and retain active donors – individuals, community groups, corporates, trusts & foundations – as a sustainable base of support for our fundraising activities
- be an influential advisor and significant contributor to the work of Wesley Mission.

### 3. Overview of role

The role is responsible for project managing existing and new fundraising campaigns in particular direct mail appeals, from inception to implementation. This includes managing external relationships with fundraising agencies/suppliers, fulfilment, data selection and reporting.

The Individual Giving Officer will drive the individual giving budget, analyse, track, report, and measure campaign success and return on investment to maximise growth opportunities and drive income generation from new and existing donors.

In addition, the Individual Giving Officer will develop donor journeys for each donor segment and implement a robust donor care program to service newly acquired and existing donors. A strong focus will be on increasing donor retention.



## 4. Relationships

Reports to: Fundraising Manager

## 5. Major role responsibilities

### 5.1 Our clients

- maximise our fundraising efforts to help bring about a measurable, positive impact for Wesley Mission's clients
- provide support for Senior Management and provide reports as required
- be a strong ambassador for the Fundraising team
- communicate our key messaging strategy to our internal clients to gain their support and ultimately create advocates

#### 5.1.1 Performance Measures

- as outlined in annual Business Plan and Employee Contribution & Development Plan

### 5.2 Our people (our team)

- work closely and collaboratively with colleagues to be an innovative, high-achieving fundraising team that delivers results in a creative and supportive working environment
- participate in Fundraising team meetings
- educate, inform and guide the team to deliver a "joined up" approach to all activities and campaigns
- contribute to a team culture of inspiration and passion for Wesley Mission
- promote and ensure adherence to Wesley Mission brand
- ensure all Human Resource (HR) policies and procedures are understood and adhered to
- on a quarterly basis, document your progress using the Employee Contribution & Development template and meet with your manager to discuss
- ensure your position description is up-to-date and identify career training and development and career growth opportunities for yourself
- regularly report to your manager on team issues such as resourcing needs, performance, training/development, disciplinary action, leave, Work Health & Safety issues.

#### 5.2.1 Performance Measures

- as outlined in annual Business Plan and Employee Contribution & Development Plan

### 5.3 Our operations

- contribute to the achievement of annual income & expenditure targets for the Individual Giving program
- work with Manager to develop and deliver annual strategic plans for donor acquisition, engagement, retention, upgrade and follow up strategies through direct mail and other income generating and lead generation activities
- help develop and then manage annual operating budget for Individual Giving (including monthly & quarterly reporting as well as forecasting)
- project manage a range of direct marketing campaigns for mail, eDM, telephone, regular giving acquisition, upgrade and conversion appeals including creating and delivering schedule of appeals, donor communications and targeted campaigns across a variety of channels to ensure the ongoing support of active cash and regular donors



- track campaign timelines, budgets and performance, ensuring all stakeholders deliver to scheduled timelines and campaign goals
- analyse and evaluate each direct marketing campaign against key performance indicators; report back to Manager in a timely and efficient manner with any subsequent recommendations
- develop strategy for acquiring new donors
- develop strategies aimed at retaining and upgrading donors across all segments; increase retention rates
- identify and investigate new direct marketing channels for monthly and one- off individual giving
- develop and undertake lapsed donor reactivation strategies (including downgrades and upgrades)
- work with Manager in the mapping & implementation of a robust donor journey for all donor segments
- work to ensure the highest level of donor care/customer service is provided to Wesley Mission supporters through the implementation of a targeted engagement & communication strategy to service new and existing donors and assist with lead generation for major donors and Bequestors
- manage external relationships with fundraising agencies and suppliers as well as coordinate fulfilment, oversee data flow/ data selection and reporting
- develop clear and comprehensive briefs for a variety of multichannel campaigns, ensuring all campaign stakeholders have a clear understanding of campaign requirements and goals
- coordinate the approvals process across Wesley Mission with regards to direct marketing appeals and campaigns
- work with the Marketing team to identify new digital media opportunities and develop digital campaigns to broaden the scope and promote appeals and regular giving
- ensure that all channels are compliant with current privacy legislation
- collaborate with the Operations team to optimise categorisation of supporter information to drive effective segmentations, relationship management and business development
- provide regular & timely reports to Manager including monthly reports
- undertake other duties as required and directed by Direct Manager

## **5.4 Our financials**

- focus on increasing fundraising income, achieving budget operating surplus, and improving return on investment by participating in financial processes including annual budget, quarterly reforecast and monthly finance review, and utilise financial tools including budget tracker, affordability model and communications calendar
- ensure all projects are delivered to budget/reforecast, while seeking additional opportunities to maximise income and minimise expense
- work with manager to provide reporting on performance of fundraising activities ensuring accuracy and timeliness
- report on activity progress, resources, opportunities, challenges and income and expenditure

### **5.4.1 Performance Measures**

- As outlined in annual Business Plan and Employee Contribution & Development Plan



## 6. Professional responsibilities

- as directed, other activities to support the delivery of the Fundraising Business Plan and Budget as requested by Manager
- be responsible under the Work Health & Safety Act for the health and safety of all persons you come into contact with during employment. All hazards and injuries must be reported through the normal process as set out in Wesley Mission's Work Health Safety and local site procedures
- participate in the review and maintenance of industry specific internal audit and quality, risk and compliance processes, as per Wesley Mission's standard policy and procedures
- in relation to Wesley Mission and the Uniting Church in Australia, attend such functions, meetings, seminars, training courses as directed by your supervisor
- participate on a quarterly basis in Wesley Mission's Employee Contribution and Development process
- take responsibility for personal career development and training
- participate in Wesley Mission's Orientation program, so as to gain an understanding of, and promote, the application of the Equal Employment Opportunity, Affirmative Action, Privacy Act, Work Health & Safety Act and other relevant legislation
- administer Wesley Mission's philosophy of care and other relevant policy documents as appropriate
- demonstrate responsible stewardship of all resources, and willingness to report impropriety in keeping with the values of Wesley Mission
- ensure the reputation and integrity of Wesley Mission is maintained at all times
- maintain confidentiality.

## 7. Selection criteria

To be successful in this position, candidates must possess the following:

### Demonstrated behaviours

- willingness to affirm Wesley Mission's vision, mission and values and enthusiastically advocate our Word and deed ministry
- outstanding interpersonal skills, flexible, patient and ability to relate well to all levels of society that Wesley Mission interacts with
- demonstrated ability to work unsupervised as well as an effective team player with a positive can-do attitude
- relates well to a range of people with sound listening and problem-solving skills
- confident professional with strong initiative and business acumen
- displays emotional maturity and resilience
- shows adaptability and initiative
- ensures data is captured completely, accurately and is up to date for all relevant systems
- works as a positive and collaborative member of the Fundraising team and wider Wesley Mission team
- consultative and flexible when working with others
- supportive of other team members, particularly in busy periods
- understanding and willingness to go above and beyond and to represent Wesley Mission as an integral member of the team as required
- unshakable drive and motivation to succeed
- is target focused on personal and team results



• **Essential skills/knowledge**

- relevant degree or qualification in fundraising/communications/marketing or related field OR a minimum of 3 years' fundraising experience in donor direct marketing and/or donor relationship management
- demonstrated experience and proven success in developing fundraising direct marketing campaigns from inception to implementation especially in direct mail and regular giving
- experience designing and implementing acquisition, retention and loyalty programs
- strong track record in campaign management and demonstrated ability to manage various campaigns simultaneously to deadline and budget
- strong financial management experience specifically in budget development, monitoring and forecasting
- a strong understanding of CRM systems (ThankQ desirable) combined with advanced ability and experience in data and marketing analytics, evaluation and reporting
- excellent communication skills (written and verbal) and strong stakeholder relationship management skills both internally and externally e.g. fundraising agencies and suppliers
- experience creating campaign briefs under time pressure and managing competing demands to ensure campaign timelines are met
- experience in developing & mapping out donor journeys and implementing strategies resulting in increased retention rates and upgrades
- an ability to demonstrate leadership in the continuous improvement of donor acquisition, retention, engagement, stewardship and development
- understanding of digital communication and marketing to support integrated fundraising campaigns
- sound knowledge of fundraising legislation, current trends and best practice
- excellent collaboration and negotiation skills
- experience working in large diverse charity with internal and external stakeholders
- proficient computer skills in Microsoft Office
- proven capability to grow revenue
- excellent time management, multi-tasking and follow-up skills

**Desirable skills/knowledge**

- current NSW drivers licence
- FIA/Fundraising qualifications and/or Direct Marketing/ADMA qualifications