

Membership and Donor Manager Job Description

Diabetes NZ Incorporated National Office - Wellington

Position Overview

Diabetes New Zealand Incorporated (DNZ) is a membership based not for profit charity. This is a busy and vital position in DNZ, being part of a small, friendly and highly productive team that provides essential support to both members and internal and external customers/stakeholders, across four main areas:

- Donor Relations
- Membership
- Finance
- Administration Support

Reporting Line

The position reports to the Director of Corporate Services. The position will also work closely with the Finance team, the Membership Services Co-ordinator, the Business Development Coordinator, the Director of Youth and the DNZ staff and will regularly liaise with local branches around the country.

This position description outlines the broad responsibilities for the role and what is expected by Diabetes NZ.

Objectives of the Position

DNZ is an organisation funded through membership fees, MOH funding grants, fundraising activities, the generosity and on-going funding by our sponsors and supporters.

It is critical therefore that we provide the best possible services, are responsive and attentive to our members and supporters' needs and ensure the highest levels of accuracy when administrating donations, financial information and other supporter details. While the role of the Fundraising & Membership Administrator is not directly responsible for fundraising, the timely, accurate and proactive management of payments has a significant impact on the perception of the organisation by our donors and their inclination to continue to give to our organisation.

The role of Fundraising & Membership Administrator is responsible for timely and accurate input of payment information into our database and the reconciliation of payment information.

This role will be in direct contact with our members and supporters when answering payment queries, generating receipting or just general enquiries about the status of membership/payments or updating records. A professional approach is required as well as strong attention to detail.

Key Responsibilities

Website (ecommerce)	<p>Processing online orders placed by visitors to our website this includes:</p> <ul style="list-style-type: none"> • Payment processing. • Stock management – updating the team on possible stock shortages.
Payment processing	<p>Administer and manage day-to-day processing of the web-based CRM membership system:</p> <ul style="list-style-type: none"> • Regularly processing incoming payments/donations, cheques & credit cards and online transactions. • Regularly processing payment gateway payments such as donations and membership renewals. • Regularly processing and managing our regular giving payments. • Processing manual transactions. • Regular banking of cash & cheque donations.
Supporter/member management	<ul style="list-style-type: none"> • Using Fundraiser Pro database to generate receipts for donors/ members, ensuring donor/member service level standards are always maintained. • Create new receipt templates for receipting. • Sending renewal letters, new member letters and receipts to our regular givers, members and branches. • Generating adhoc receipting as a result of donor/member/ supporter requests. • Liaise with Branch treasurers, review financial information and assist as required.
Membership Services Co-ordinator support	<p>Supporting our Membership Services Co-ordinator:</p> <ul style="list-style-type: none"> • Handling inbound phone calls and emails • Providing cover for the Membership Services Co-ordinator during annual leave and/or peak times.
Reconciliation	<ul style="list-style-type: none"> • Matching all database entries to bank statements. • Checking all payments are correct. • Liaising with the finance team when reconciliation issues arise. • Daily reconciliation processing. • Reconcile and process monthly branch payments for membership and donations and prepare member and donor activity reporting.
General database support	<p>Helping with database management:</p> <ul style="list-style-type: none"> • Supporter updates. • Data loading. • Assisting with data cleaning exercises. • #1 packs data entry. • Newly diagnosed packs data entry.
Fundraising General	<ul style="list-style-type: none"> • Assist with the development of various fundraising programmes as delegated by the Business Development Co-ordinator and Project Manager.

	<ul style="list-style-type: none"> • Answer queries from donors and help to resolve problems.
CRM and Financial Reporting	<ul style="list-style-type: none"> • Assist with the financial year end process including work paper and report preparation and liaison with auditors. • Provide reports and data analysis from CRM system, to the Chief Executive (CE) and the Director of Corporate Services. • Maintain spreadsheets using basic functions and formulas. • Work with Director of Corporate Services to streamline membership and online donation processes and ensure that database financial reporting accurately captures membership and donor giving history.
Donor and Supporter Relations	<ul style="list-style-type: none"> • Grow our funding base of donors, including individual donors, community groups, businesses and organisations. • Oversee the maintenance and development of the database and information management system that contains all donor and contacts. • Identify potential new income streams and plan for donor development e.g. social enterprise, bequests. • Donor Care. • Donor Communications (Omni Channel). • Donor Relations. • Campaign Management. • Direct Mail out. • Regular giving. • Regularly gather and analyse donor data to inform timely and effective decision making.
Health & Safety – Individual	<ul style="list-style-type: none"> • Take reasonable care for personal safety and wellbeing. • Take reasonable care that acts, or omissions do not adversely affect the safety and wellbeing of others. • Report all occupational injury, illness, near miss incidents, environmental spills or fire, regardless of its severity, to a supervisor. • Report all hazards which may result in an injury, illness, spill or fire to a supervisor. • Cooperate with any reasonable policy or procedure of DNZ relating to safety or wellbeing in the workplace that has been notified to staff. • Comply, so far as reasonably able, with any reasonable instruction by DNZ to allow DNZ to comply with the law.
Other	<ul style="list-style-type: none"> • Carries out other tasks and duties as may reasonably relate to the role, as requested.

Key Accountabilities and Expectations

- Take responsibility for the delivery of the tasks identified above and ensure that all tasks and activities are delivered in a timely and accurate manner.
- Always deliver a consistently high standard of customer service to external and internal customers and be professional.
- Seek to continuously improve customer service and improve the reputation and credibility of Diabetes NZ.
- Maintain close relationships with internal customers.
- Communicate regularly with the Director of Corporate Services to review workloads, prioritise tasks and plan work.
- Ensure compliance with Diabetes NZ's processes, policies, and legislative requirements.
- To meet performance criteria set by the Director of Corporate Services at the start of each reporting year.
- Ensure business processes pertaining to payment management tasks are done at the agreed time with a high level of accuracy.
- To complete assigned projects or tasks on time, within budget and in accord with any delegations given or limitations enunciated by DNZ Policy, Chief Executive or the Director of Corporate Services.
- To represent and present DNZ in a positive manner which maintains its reputation and relationships with significant opinion leaders and organisations.

Qualifications/Skills and Position Requirements

- Experience in the Not-For-Profit sector.
- Minimum of 2 years' experience working with membership, donors and fundraising.
- Knowledge and understanding of individual giving and legacy fundraising.
- Ability to develop and monitor the implementation of fundraising strategies, budgets and operational plans.
- Experience with the usage and maintenance of a database/CRM system. Experience working with Fundraiser Pro databases is highly desirable.
- Strong knowledge and interest in accounting, data management, and administrative management practices and procedures. (Accounting qualification not required).
- Strong administration skills with a high level of attention to detail.
- Advanced IT skills (Fundraiser Pro, MS suite of products), databases, mail merges, and email.
- The ability to organise business processes and workflows.
- Ability to learn and understand difficult concepts quickly.
- Ability to relate well to people and clearly explain technical concepts.
- Integrity and high personal and professional standards.
- Excellent written and verbal communication skills.
- Sound interpersonal skills. Self-starter with a flexible can-do attitude and a great team player.
- Commitment to the DNZ, Chief Executive and Leadership Team.

- A strong customer service ethic – must demonstrate follow up and excellent customer communication

Competencies

Client Management	Is dedicated to meeting the expectations and requirements of internal and external customers. Gains the customer's trust and respect. Raises the profile of client issues internally and encourages others to consider the client perspective.
Listening and Interpersonal Skills	Practices attentive and active listening. Builds rapport by demonstrating an understanding of different people's needs and how they interact. Reads situations quickly. Accurately processes and communicates messages received.
Informing	Provides the information that people need to know to do their jobs. Provides accurate information so that people can make informed decisions in a timely manner.
Action Oriented	Takes advantage of and is energised by challenging situations. Can act with a minimum of planning to identify and seize opportunities.
Time Management	Uses time effectively and efficiently. Can make accurate estimates of time requirements. Is flexible and able to work efficiently in time-pressured circumstances to complete tasks and make room for other activities as they arise.
Self-Awareness	Knows personal strengths and weaknesses. Takes steps to positively influence perception by others and is able to manage and use own emotions constructively when receiving feedback.
Self-Development	Is personally committed to setting own goals in relation to the role, as well as pursuing future development opportunities. Assesses and provides information about own performance relative to role requirements and performance objectives in order to improve personally and professionally. Identifies actions to address development needs.
Innovation Initiative	Identifies novel approaches to complete tasks more effectively and efficiently. Willing to go the extra mile. Proactively seeks to improve products and services and plans ahead for potential problems or opportunities and takes appropriate action. Seeks out and/or accepts additional responsibilities as appropriate. Has the ability to work autonomously, be self-motivated, with a real desire to get things done.

Personal Attributes

- **Integrity and Trust:** Keeps their word, does what they say they will do, tells the truth, acts in line with organisational values, keeps confidences and admits mistakes. Discloses information and is truthful in all dealings.
- **Community Focus and Commitment:** Has an appreciation of working with volunteers in the not-for-profit sector, and values that experience. Someone who has a desire to make a difference in the lives of the client group.
- **Patience:** Is tolerant with people and processes. Listens and checks before acting. Sensitive to due process and proper pacing.

- **Perseverance:** Continues to work hard to achieve goals, despite barriers or difficulties. Pursues to the finish. Seldom gives up.
- **Alignment with the Organisation:** A demonstrable interest and enthusiasm for what Diabetes NZ represents and is capable of representing in New Zealand.