



## *Position Description*

### **Appeals & Future Planning Manager**

**Reports to:** Fundraising Manager  
**Direct Reports:** Fundraising Officer (FTE 3 days/week)  
**Level:** Corporate Services Capability Framework Level 8  
**Date Prepared:** January 2018 (Rev February 2018)

#### **Context and Purpose**

The *Appeals & Future Planning Manager* plays an integral role in the success of our services and the achievement of our Vision, Mission and organisational objectives. They do this by delivering upon the Fundraising Team's Purpose: ***To inspire and involve Australians to help people with a disability live a great life, not an ordinary one.*** This support comes in many forms, and this role is primarily involved in driving donations through delivering quarterly fundraising appeals (in large part by direct marketing, also through solicitation of major gifts) and generating gifts in Wills.

They recognise the right of people with disabilities to inclusion, participation and self-determination. Their personal values align with those of House with No Steps (HWNS) and this is demonstrated in their work on a daily basis.

The position also has responsibility to manage and mentor the Fundraising Officer in these portfolios (they work 60% within Appeals and Future Planning, the remaining 40% across Community Fundraising, Corporate Volunteering, and Events).

#### **Primary Objectives**

- Manage the Appeals portfolio and Future Planning portfolio to maximise supporter numbers, donor experience, income and profit
- Contribute to the unity of the fundraising team, and the effectiveness of all activities through genuine portfolio-neutral pipeline thinking
- Work with the Fundraising Officer to train, mentor and manage them for their growth and the growth of the different fundraising portfolios
- Support the organisation, its profile and the profile of fundraising within it

#### **Key Accountabilities**

##### Teamwork and training:

- Contribute to raising the profile of Fundraising internally through internal communication about the need for fundraising and the impact of donations, and share success stories with the team (and with the Board via the regular Management Reports) – *measured by Fundraising benchmarks in staff survey*
- Seek ongoing training, especially in fundraising best practice – *undertake self-directed skills development activity at least once per year*

- Foster an attitude of continuous improvement and innovation – especially in donor propositions, journey, channels and agency management
- Work to break down the silos within Fundraising and develop a pipeline mentality
- Empower direct report and volunteers by delegation of meaningful tasks – *monitored in their Annual Review and other feedback*
- Maintenance of good relations with other divisions of HWNS to ensure the smooth implementation of HWNS' fundraising activities
- Assist with other fundraising activities as required by Fundraising Manager

#### Profit focus, Budgeting and reporting:

- Involvement in Budget setting for FY18/19, with a focus on profitability/ROI – *Budget for these two portfolios approved by Board*
- Focus on profitability; Seek expense efficiencies as appropriate. Record and control all expenses. Regularly monitor results and prepare post-project evaluation reports – *year-on-year increase in income, profit and supporter numbers*
- Working collaboratively with the team to achieve forecast Budget on all Appeals and Future Planning fundraising activity – *as above*
- Provide accurate and timely reporting on all areas of Appeals and Future Planning – *reports supplied in a timely manner, with minimal corrections required*

#### Data accuracy and customer care:

- Work with the Fundraising Administration team to ensure the input and maintenance of accurate data while championing the need for high levels of data integrity across the operation – *no issues arising from inaccurate data or misunderstandings with the Fundraising Administration team*
- Oversee the pathway to supporter satisfaction, demonstrating the essence of customer care in all areas – *reduction in customer care issues*

#### Appeals; introduce industry best practice to:

- Optimise Appeals to lift revenue (including personalisation, urgency of need, tailored ask strategy etc) – *total income and average donation increased on equivalent prior year campaign*
- Meet Budgeted income and net profit for Appeals, Direct Marketing Cost Centre (8825) – *annual Budget met*
- Tightly manage expenses to maximise net profit, especially for shoulder appeals – *appeal expense per supporter reduced year-on-year*
- Report donor impact to supporters – *supporters updated on the outcomes of their previous donations at least twice per year*
- Maintain acquisition focus during major Appeals – *cost-effective net increase in supporter numbers year-on-year*
- Explore multi-channel campaigns – *evidence of additional media considered, especially digital*
- Review and optimise all Appeal touchpoints – *clear touchpoint analysis and optimisation plan in place by December 2018*
- Optimise donation form, including PayPal, and communication of donation impact – *donation form updated to include all industry best practice, with PayPal included*
- Investigate how to optimise MV and HV giving – *plan in place by December 2018*
- Issue Post-Project Report on each Appeal, especially response to topic, data segmentation, acquisition undertaken and any other A/B tests implemented – *accurate summary report with*

*key learnings and recommendations within 2-weeks of Appeal close (ie when next Appeal is sent)*

**Future Planning:**

- Build on the foundations of the Future Planning Program, including prospect scoring methodology, and the 2-year Future Planning Communications Plan (a multi-channel multi-touchpoint marketing program and activity log encompassing mail and email Supporter Survey, bequest appeals, local events and tours, social media, articles, videos, face-to-face and phone stewardship) – *2-year plan delivered and updated on a rolling basis*
- Meet Budgeted income and net profit for Future Planning Cost Centre (8823) – *annual Budget met*
- Ensure the Raiser's Edge (RE) database stays up-to-date with information on category prospects; process gifts/donations into Raisers Edge and Bequests received – *RE and Dashboard accurate and up-to-date*
- Provide accurate reporting on all areas of the Future Planning Program and assist with the ongoing evaluation of the Future Planning portfolio of activities (including dashboard monitoring and optimisation, and Future Planning 'value pyramid') – *regular reporting as required, including Management Reports for the Board*
- Document written bequest pathway/ supporter journey – *journey updated, clearly written and processes adhered to*
- Follow-through with Board-approved launch of HWNS Endowment Fund – *Fund successfully launched by September 2018, with \$50k initial funding received by December 2018*

**Working relationships:**

- Internal: Fundraising Manager, Fundraising Officer, wider Fundraising Team, Marketing and Community Team, Support Services, Businesses, relevant shared services teams
- External: Supporters (including major givers and prospects), Bequestors and prospects, Suppliers/Contractors/Agencies, HWNS customers and their families

**Essential knowledge, skills, experience and values required**

1. Experience in the fundraising industry, including sound knowledge of fundraising practices that maximise results
2. A self-motivated and committed professional, with a positive 'can-do' attitude and a genuinely inclusive collaborative approach
3. Excellent organisation, time management and financial skills, and a strong attention to detail
4. Demonstrated excellent communication skills including ability to present to others, and to inspire and motivate donors and stakeholders
5. Confident working with a high level of autonomy, reporting and delivering on budget
6. Demonstrated management, mentoring and training of direct report(s) for their growth and development
7. Well-developed people skills, including the ability to work cooperatively with other team members
8. Ability to develop and maintain strong relationships with internal and external stakeholders to achieve financial targets and outcomes
9. Clear understanding on the importance of donor stewardship
10. Sensitivity to the issues associated with the provision of human services in the non-government/ 'for purpose' sector

11. Ability to show initiative and achieve objectives
12. Strong Microsoft Office Skills (including Word, Excel and PowerPoint)
13. Experience working with a donor or CRM database (preferably Raiser's Edge)
14. Adherence to HWNS Code of Conduct at all times
15. A relevant tertiary qualification and/or equivalent experience

***Desirable***

16. Experience in a similar role (or roles), including donor engagement, direct marketing and digital campaigns, major giving and future planning (Bequests)
17. Experience dealing with people with a disability
18. Current driver's license

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

