

POSITION DESCRIPTION (PD) TEMPLATE

All employees/workers within Catholic Mission must have a position description.

Position Title (Generic):	Assistant		
Position Title (Specific):	Casual Telephone Fundraiser		
Reporting to:	Donor Engagement Supervisor (Call Centre)		
Direct Reports:	Nil		
Position Location:	(DONS) Donor Services National Office If Other, please identify: Click here to enter text.		
Full Time Equivalent (FTE):	Full-time=1.0FTE	Date:	20/03/2018
Financial Authority:	<input type="checkbox"/> Authority level to not applicable <input type="checkbox"/> Credit card to monthly cap of not applicable		

About Catholic Mission	<p>Catholic Mission (CM) is the international mission agency of the Catholic Church in Australia. It comprises the four Pontifical Mission Societies. Locally and globally, we answer the call to love God and to love our neighbour, and work to establish the Reign of God through building communities of missionary disciples who share their faith by proclaiming the Word, supporting Church communities and people in need, acting for justice and creation, and through the Society of the Holy Childhood, adopting child-focused, community-based development programs.</p> <p>Our guiding principles and values are: Be prophetic; Be theologically grounded; Be missionary; Be collaborative; Be respectful; Be affirming; Be accountable; Celebrate!</p>
Purpose of Role	<p>This position exists within the Donor Services Department in National Office, North Sydney. It is a role that also works closely the Fundraising Department.</p> <p>As part of CM's newly established Donor Engagement Team within Donor Services, undertake donor-centric telephone calls in support of CM's Regular Giving Programs inspiring incremental growth for CM's global works with children, communities and church leaders.</p> <p>Securing long term donations through the focused Regular Giving Programs will be the main attributes of the role, while maintaining the spirit of CM's guiding principles of supporting people in need through community-based development programs.</p> <p>Your focus and your passions will be the key driving success factors.</p>

Primary Duties & Key Performance Indicators (KPIs)	
Key Responsibility Areas – Expected End Results	Key Performance Indicators (KPIs) – Measures of Success
1. Perform 3 shifts of outbound calling per day with each shift to be no more than 8 hours in total.	<ul style="list-style-type: none"> The value of donations received against the quota set should reflect a minimum of a 10% increase. Donor records (including donation paperwork) and credit card details are securely locked and not left on desktops. Work is completed within the timeframe identified by Donor Engagement Team Leader and notifying the Team Leader if work cannot be completed by deadline set.
2. Actively contribute to and participate in continuous process improvement.	<ul style="list-style-type: none"> Work with the team leader to revise and refine scripts. <ul style="list-style-type: none"> 100% of hours worked should be devoted to reviewing and improving outbound call scripts. Outbound call scripts are clear and with a distinct pastoral flavour that will result in quota dollars being met and/or exceeded.
3. Work with the Database administrator on analysis of feedback reports to determine the future call strategy.	<ul style="list-style-type: none"> A commitment to recognising that outbound calls are both an opportunity for feedback as well as retention. A commitment to obtaining additional donor data that is currently not on the database, including capturing information about why the donor may not be interested in the proposition being offered: for example... <ul style="list-style-type: none"> That they have moved to another regular giving (RG) program in CM? That they have moved to another charity? That they understand the positive results of their support?
4. Increase the base of regular givers to CM's current RG programs: <ul style="list-style-type: none"> Children's Mission Partners Friends in Faith (work with communities) Leaders for Life (work with church leaders) Myanmar Mission Partners 	<ul style="list-style-type: none"> Specific KPI's will be agreed based on existing RG data reports. These KPIs will be identified in the Performance Development and Review (PDR) Objectives Setting document. KPIs will be reviewed midway through probation; that is, at 3 months.
5. Be willing to connect with people and build rapport, both within the CM team and externally with our valued donors.	<ul style="list-style-type: none"> Being adaptable – taking on constructive criticism and being open to methods of conversation with customers based on what works and doesn't work for engaging with CM donors. Actively participates in both the fundraising and the donor services teams. Fosters an enjoyable work culture by focussing on accountability, collaboration, flexibility, good communication, integrity and celebration of milestones accomplished.
6. Other initiatives as directed by your supervisor.	<ul style="list-style-type: none"> Documentation for initiatives maintained and updated. Proactive in identifying issues/problems (with scripts or other), alerting the Donor Engagement Team Leader (Call Centre) in a timely manner and actively seeks to resolve the issue/problem within a relevant timeframe. Bequest prospect calls. Additional tasks may include: Thank you calls, welcome calls, birthday greetings, and other relationship building calls.
7. Comply with the <i>Telephone Practice Note</i> of Fundraising Institute Australia (FIA).	<ul style="list-style-type: none"> Telephone fundraising practices as delineated in FIA's <i>Telephone Practice Note</i> are strictly adhered to. Practices contrary to the Telephone Practice Note are identified and stopped immediately. Understanding FIA's <i>Telephone Practice Note</i> are incorporated as part of CM's induction program.

<p>8. Comply with CM work, health and safety (WHS) measures and standards.</p>	<ul style="list-style-type: none"> • Safe work practices are observed in accordance with training and instruction given. • Risks/hazards are identified and reported where appropriate, in order to eliminate or prevent the risk recurring. • Consultative processes provided by Catholic Mission are engaged.
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Challenges of the Position
<ul style="list-style-type: none"> • New initiative for CM.
<ul style="list-style-type: none"> • Small Team.
<ul style="list-style-type: none"> • Understanding the impact of the activities of the Donor Services Team (DST) to other parts of CM and action work accordingly.
<ul style="list-style-type: none"> • Working across both the Fundraising and Donor Services teams to achieve mutually beneficial outcomes.
<ul style="list-style-type: none"> • Addressing complicated/complex donor queries and complaints.
<ul style="list-style-type: none"> • Shifting to a culture of enhanced donor-centric processes and service.
<ul style="list-style-type: none"> • Achieving a balance between efficiency and quality.

Person Specification			
Essential	Knowledge <ul style="list-style-type: none"> • Intermediate level Word, Excel and Outlook as well as general computer competence and confidence. 	Desirable	Knowledge <ul style="list-style-type: none"> • Tertiary qualifications in Business, Communications or Marketing. • Fundraising Code of Conduct Training (via FIA)
Essential	Experience <ul style="list-style-type: none"> • Minimum 3 months experience in an outbound call centre as a successful telephone fundraiser. • Customer service experience with a strong systems and procedures focus. • Comfortable with cold calling and donor engagement. • Strong data entry and database/Customer Relationship Management (CRM) experience. 	Desirable	Experience <ul style="list-style-type: none"> • Call-centre and dialler system. • Database management software (iMIS or other). • Not for profit industry. • Donation processing. • Complaint handling. • Working in role with multiple stakeholders.
Essential	Skills <ul style="list-style-type: none"> • Proficiency in oral English language. • Clear and concise oral communication. • Proactive in taking the initiative. • Team player. • Good time management and self-directed. • Commitment to donors. • Resilient with an ability to handle rejection professionally. 	Desirable	Skills <ul style="list-style-type: none"> • Excellent Customer Service skills • Good written communication skills • Good organisational skills
Other	<ul style="list-style-type: none"> ✓ A Criminal History Check is required for this position. ✓ This position may require work on Saturdays. ✓ This position requires flexibility in start and finish times, that is, there is potential to work shifts of 5 hrs or 7.5 hrs with varied start times and end times, for example: 10am to 3pm; 8am to 5pm or 10am to 7pm. 		

Key Stakeholders/Relationships	
Internal	<ul style="list-style-type: none"> Fundraising Team Donor Services Team
External	<ul style="list-style-type: none"> Individual/Organisational Donors

PREPARED BY		REVIEWED BY	
Manager's Name	Manager Name (eg. Executive Director)	Manager Name (eg. Executive Director)	Sharon Messina
Manager's Position Title	Manager's Position Title	Manager's Position Title	HR Manager
Date	Date	Date	13/12/2018

AUTHORISATION: 1 st Level		AUTHORISATION: Final	
Manager Name	Peter Gates	Manager Name	Brian Lucas
Manager's Position Title	Deputy National Director	Manager's Position Title	National Director
Date	13/12/2018	Date	13/12/2018