



# The Fred Hollows Foundation

## Job Description

<b>Name</b>	Vacant
<b>Job Title</b>	Customer Service Coordinator
<b>Division</b>	Donations and Database, the Supporter Services Division of Marketing and Fundraising
<b>Position type</b>	Full-time based in Sydney office
<b>Reporting &amp; working relationships</b>	This position reports directly to the Senior Coordinator – Donations and Database
<b>Date</b>	February 2010

<b>Role summary &amp; time allocation</b>	<b>% time</b>
<p>The primary responsibility of this role is to contact The Fred Hollows Foundation's (FHF) supporters by telephone and/or correspondence to build excellent supporter relationships and grow single gift and regular giving income. Duties include:</p> <ul style="list-style-type: none"><li>○ Thank higher level new and ongoing supporters for their gift, and efficient servicing of these donors through follow-up correspondence. 20%</li><li>○ Service calls and follow up correspondence to Regular Giving supporters to:<ul style="list-style-type: none"><li>- advise of declined gifts, obtain updated details of accounts and seek to retrieve missed donations, for each Regular Giving run</li><li>- ensure viability of new F2F Regular Giving supporters during the Cooling Off Period (COP)</li><li>- reactivate lapsed or held Regular Giving supporters</li><li>- upgrade selected Regular Giving amounts</li><li>- covert selected cash supporters to Regular Giving supporters</li><li>- undertake database maintenance to reflect gift adjustments, gift status and changes to supporter account details for Regular Giving supporters</li></ul>45%</li><li>○ Develop procedures, reports and scripts, maintain statistics on contact with supporters and identify improvements and efficiencies. 10%</li><li>○ Provide back up for Donor Supporter Services Miracle Club Coordinator in preparing and running Regular Giving files, making gift adjustments, providing reports for contact and for finance 10%</li><li>○ Provide general Donor Support 10%</li><li>○ Compliance and reporting 5%</li></ul>	

Responsibilities and related tasks	Performance objectives
<p><b>Thanking calls to selected high end single gift and Regular Givers</b></p> <ol style="list-style-type: none"> <li>1. Contact high value supporters by telephone to thank them for their gifts. Forward receipts with personalised or prepared thank you cards, as appropriate</li> <li>2. Contact new non Face to Face (F2F) regular giving supporters to thank them for their regular gift arrangement</li> </ol>	<ul style="list-style-type: none"> <li>• Positive telephone and written contact with supporters to build relationships and achieve immediate and long-term outcomes for The Foundation</li> <li>• Calls for single gift/ regular giving arrangement are made and receipts/confirmations mailed within 3 days of the receipt/confirmation being available</li> <li>• Clear appropriate notes, updated details and actions are entered into the database for each contact including information of importance provided by supporter</li> <li>• Supporter requests or queries are acted on promptly and to the satisfaction of the supporter</li> </ul>
<p><b>Service calls to obtain updated details of declined credit card and bank account information, ensure viability of new F2F supporters during the COP and reactivate held supporters.</b></p> <ol style="list-style-type: none"> <li>1. Contact of Regular Giving supporters by primarily telephone but also SMS and email, to advise of declined gift, obtain updated details and seek to obtain missed payments</li> <li>2. For new F2F supporters, review unsuccessful donations within the COP, undertake contact in accordance with the protocols and ensure terminations are actioned as requested by supporter or in accordance with protocols, prior to COP date</li> <li>3. Update database in relation to contact action, supporters' details, new gifts, gift adjustments &amp; terminations</li> <li>4. Follow-up action or contact required including written contact</li> </ol>	<ul style="list-style-type: none"> <li>• Positive telephone &amp; written contact made with supporters to build relationships and achieve immediate and long-term outcomes for the Foundation</li> <li>• Contact, re-attempt &amp; outcome targets are achieved</li> <li>• New F2F supporters' gifts that should be terminated within COP, are terminated</li> <li>• Queries and reports are run and relevant supporters are contacted to obtain new details or to reactivate or terminate gifts</li> <li>• Appropriate notes are cleared and updated details and actions are entered into the database for each contact including information of note provided by supporter</li> <li>• Update/termination confirmation letters/emails with any required other documents are sent to supporters promptly</li> <li>• Supporter requests or queries are acted on promptly and to the satisfaction of the supporter</li> <li>• Contact rates are maximise by accommodating for flexible work hours</li> </ul>
<p><b>Conversion and upgrade calls for selected Regular Giving segments</b></p> <ol style="list-style-type: none"> <li>1. Contact supporters by telephone with a view to upgrading selected existing regular gifts or converting supporters to regular giving</li> <li>2. Prepare advice to supporters confirming new or upgraded Regular Gifts</li> </ol>	<ul style="list-style-type: none"> <li>• Positive telephone &amp; written contact with supporters is made to build relationships and achieve immediate and long-term outcomes for the Foundation</li> <li>• Contact, re-attempt &amp; outcome targets are achieved</li> <li>• Confirmation letters for upgrade, conversion or new regular giving are sent to supporter, with all required additional materials, promptly</li> <li>• Clear appropriate notes, updated details and actions are entered into the database for each contact including information of</li> </ul>

	<p>note provided by supporter</p> <ul style="list-style-type: none"> <li>• Supporter requests or queries are acted on promptly and to the satisfaction of the supporter</li> <li>• Contact rates for conversion and upgrade calls are maximised by accommodating for flexible work hours</li> </ul>
<p><b>Reporting and analysis</b></p> <ol style="list-style-type: none"> <li>1. Maintain statistics and provide analysis and reports on Regular Giving supporter contact and outcomes</li> <li>2. Provide back-up preparation of reports using Query, Export, Excel or other analysis tools</li> <li>3. Develop and review reporting systems including advice and analysis of trends, issues and problems</li> </ol>	<ul style="list-style-type: none"> <li>• Monthly reports are provided within 5 working days of end of each month</li> <li>• Reporting systems are current and reflect needs of Marketing and Fundraising</li> </ul>
<p><b>Back up for Donor Supporter Services Miracle Club</b></p> <ol style="list-style-type: none"> <li>1. Prepare and send Regular Giving files or as required</li> <li>2. Download regular gift “bounceback” data and adjust gifts accordingly</li> <li>3. Respond to <i>Miracles</i> Inbox emails including database maintenance and follow up or confirmation with supporters</li> </ol>	<ul style="list-style-type: none"> <li>• All gift files are reviewed, corrected, where necessary &amp; sent on scheduled date</li> <li>• Regular gifts are adjusted in accordance with Raisers Edge procedures</li> <li>• <i>Miracles</i> emails are actioned accurately, promptly and with a view to nurturing relationships with supporters</li> </ul>
<p><b>Donor Support</b></p> <ol style="list-style-type: none"> <li>1. Provide backup support to enquiries via the 1800 Donation Line</li> <li>2. Action requests from supporters in a timely effective and polite manner</li> </ol>	<ul style="list-style-type: none"> <li>• 1800# is always answered – calls do not go to message bank</li> <li>• Supporter requests or queries are acted on promptly and to the satisfaction of the supporter</li> </ul>
<p><b>Other Duties</b></p> <ol style="list-style-type: none"> <li>1. Understand and comply with The Foundation’s Policy and Procedure Manual, ACFID’s Code of Conduct, state fundraising legislation, national privacy and copyright laws and PCI Compliance requirements</li> <li>2. Participate or provide input into relevant meetings, eg D&amp;D and working group meetings, Board reports etc.</li> <li>3. Provide input into relevant Foundation Procedures</li> <li>4. Full compliance with relevant legal requirements and organisational expectations</li> <li>5. Undertake relevant training as required by supervisor/manager</li> <li>6. Other duties as may arise</li> </ol>	<ul style="list-style-type: none"> <li>• Adherence to The Foundation’s Policy and Procedure Manual, ACFID’s Code of Conduct, state fundraising legislation, national privacy and copyright laws and PCI Compliance requirements</li> <li>• Valuable contributions are made in meetings and in the development of relevant procedures</li> <li>• Necessary skills and knowledge acquired to meet the requirements of the position</li> <li>• Performance measures will be agreed when other duties arise</li> </ul>