

Position description

Position title:	Donor Administration Officer
Employer:	Baker Heart and Diabetes Institute
Department:	Community and Corporate Relations
Supervisor/Manager:	Direct Marketing Manager
Date:	September 2022

Background

The Baker Heart and Diabetes Institute is an independent, internationally renowned medical research facility focused on predicting, preventing and treating cardiovascular disease, diabetes and other related health conditions. We have a long and distinguished history, spanning more than 97 years, with our work critical to today's healthcare challenges.

The Baker Institute is well-positioned to address these challenges with multidisciplinary teams, comprising medical specialists, scientists and public health experts all focused on translating laboratory findings into new approaches to prevention, treatment and care.

Headquartered in Melbourne, we are a key player in research, translation, education, advocacy and health promotion with a staff of more than 450 (including scientists, clinicians and students). Our senior staff represent us on a broad range of government advisory boards, from health and wellbeing to science and innovation. We also collaborate with leading international research groups as part of our commitment to assisting vulnerable communities around the world.

The Baker Institute is funded through a diverse range of sources including competitive grants, Federal and State Governments, service and clinical income and philanthropic support.

Department

The core objective of the Community and Corporate Relations team (CCR) is to raise funds that enable the Institute to achieve its mission. Programs include:

- Direct Marketing — renewal, retention, acquisition, regular giving, database management, donor administration.
- Bequests — gifts in wills and bequests in perpetuity.
- Community Fundraising — peer to peer fundraising events and activities.
- Major Gifts — relationships with high net worth individuals and private trusts.
- Trusts and Foundations — grant submissions to philanthropic trusts and foundations.
- Corporate Partnerships — sponsorship, endorsement and business development activities.
- In conjunction with Public Affairs, CCR conducts marketing strategies targeted to patients, health professionals, research participants and students.

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Nature of environment

The Baker Institute has a project-oriented environment, encompassing a local and multi-site organisational structure. The staff comprise mainly research, scientific and specialist clinical personnel engaged in the capacity of permanent, grant specific and casual employment. The atmosphere is collegial, usually relaxed and informal though busy and often dynamic with frequent deadlines that must be met.

The environment is often demanding and challenging with a strong team orientation but also provides the opportunity to work independently and show initiative. The nature of the work also requires a focus on accuracy and detail.

The nature of the CCR environment is deadline driven; fast-paced, with multiple stakeholders and competing priorities.

Key job requirements, responsibilities and duties

Under the guidance of the Direct Marketing Manager and Senior Data Analyst, the role will be responsible for (but not limited to):

Administration

Contribute to the success of the CCR team through the provision of excellent donor care and administration, including but not limited to the following:

- Efficiently and accurately manage the donation and administration processes - processing of donations, distribution of receipts, responding to donor communications.
- Manage the fundraising email inbox and telephone line (including voicemail) to ensure that enquiries, updates and complaints are handled in a way that demonstrates the strong appreciation the Baker Institute has for our donors by addressing all enquiries respectfully, sensitively and in a timely manner.
- Liaise with the Direct Marketing Coordinator to ensure that campaigns are supported by the back end processing, and assist with the preparation of relevant donor correspondence for distribution with campaign receipts.
- Be the primary point of contact for CCR regarding any financial reconciliations, processing of bequests, major gift donations, gifts in memory, trusts and foundations grants, and forward any receipts/paperwork to relationship managers.

Database

- Maintain the currency, accuracy and data integrity of the database (Salesforce NPSP), by accurately processing updates and donations are allocated to the correct campaigns codes.
- Record appropriate notes on correspondence from all donors on database.
- Ensure a high level of database management and recommend improvements as required.

General

- Manage stationery and marketing collateral stock levels - including letterheads, welcome packs, brochures and envelopes, and that Direct Marketing area is kept tidy and organised.

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- Ensure that sensitive information (such as credit card details) are stored securely.
- Proactive attendance at team meetings, relevant seminars and staff meetings.
- Represent the Baker Institute at internal and external functions and special events as required.
- Provide support across the CCR team as needed.

Meet statutory requirements of the company

Maintain up to date and accurate knowledge in:

- OHS legislation.
- EEO legislation.
- Privacy legislation.
- Confidential Information Policy.
- Baker Heart and Diabetes Institute Code of Conduct.
- Australian Code for the Responsible Conduct of Research.
- Baker Heart and Diabetes Institute Intellectual Property Agreement.

Requirements of position holder

Education level

- Relevant work experience in administration and customer service — in a fundraising environment would be advantageous.
- An equivalent combination of relevant experience and/or education/training.

Experience

- Minimum of 1 year experience in administration for fundraising or similar.
- Experience in office management, customer service or general administration.
- Experience in data entry and database maintenance.
- Experience in the not-for-profit sector is desirable but not essential.

Communication/interpersonal skills

- Excellent communication skills and customer/donor service focus. Capacity to treat donors with compassion and sensitivity.
- Excellent time management and organisational skills, and the ability to remain calm under pressure.
- A high level of professionalism and strong attention to detail.

Knowledge

- Strong computer literacy in Microsoft Office, particularly Word and Excel.
- Proficient experience with not-for-profit CRM database is desirable.

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Abilities

- Demonstrated time-management ability to meet deadlines without compromising work quality and accuracy.
- Demonstrated ability to work in a team environment as well as autonomously without close supervision.
- Demonstrated ability and willingness to take initiative to improve and enhance existing systems and procedures (quality assurance).
- Demonstrated ability to maintain confidentiality and comply with privacy requirements.
- Demonstrated ability to work across diverse stakeholders.

Summary of position

The Donor Administration Officer will act as the first point of contact for existing and prospective supporters and the general public and as such needs to provide excellence in donor care. The role is required to deliver an exceptional standard of administrative support to the Fundraising team, including: accurate and timely data entry and donation processing, donor liaison and care, efficient and effective financial administration, and a high level of database management. The role will also provide event and administrative support across the department as needed.

As the Baker Institute evolves to meet its changing strategic and operational needs and objectives, so will the roles required of its staff members. As such, staff should be aware that this document is not intended to represent the position, which the occupant will perform in perpetuity.

This position description is intended to provide an overall view of the incumbent's role as at the date of this statement. In addition to this document, the specifics of the incumbent's role will be described in Key Performance Indicators (KPIs) developed by the incumbent and relevant supervisor as part of the Baker Institute's performance appraisal and development process.

The Baker Institute is an Equal Opportunity Employer and we encourage interest from Aboriginal and Torres Strait Islanders and members of the LGBTIQ+ community for roles within the Institute. We value diversity, inclusivity, gender equity and we promote family-friendly practices. We are a proud recipient of an inaugural Athena SWAN Bronze Award from Science in Australia Gender Equity (SAGE).