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<b>Date:</b>	<b>July 2021</b>
<b>Position:</b>	Fundraising Finance Officer
<b>Responsible to:</b>	Fundraising Operations Manager
<b>Hours:</b>	0.7 FTE - 30 hours per week
<b>Functional Relationships:</b>	<b>Internal</b> Director People Quality and Community Fundraising Team – Including Retail and Farming Reception/Administrators Support Services Team Volunteers <b>External</b> Service Providers/Contractors

#### **PURPOSE**

To provide specific finance duties and CRM database management support for the Arohanui Hospice Foundation to ensure it meets its objectives.

#### **POSITION RESPONSIBILITIES**

##### **Supporter (Donor) Database Management and Process Management**

- Develop and maintain working desk files for all CRM data inputting processes.
- Manage the rules and conventions around data inputting to ensure that all new supporters are entered in the correct format, tagged to the correct event, campaign and group.
- Provide guidance, training and support to staff within the Foundation Team and across the organisation on the use of the supporter database.
- Generate reports as required.
- Provide day to day financial administrative support for the hospice's fundraising team.
- Maintain accurate financial records within the hospice's donor database
- Input donor data, update donor details and provide donor lists when required
- Generate and segment mailing lists for correspondence.
- Record donations and reconcile into accounting system and CRM donor database, including coding against correct general ledger codes
- Troubleshoot any issues that arise during the processing of donations with a solutions focus.
- Issue donation receipts and "thank you" letters
- Issue annual receipts for regular givers

##### **General Fundraising Financial Administration**

- Work with reception each day to process incoming mail and record donations of credit cards and cash
- Receipt all cash and donations in a timely manner
- Carry out regular banking of all cash received

- Reconcile cash from hospice sales table and reception raffles for banking
- Count, record and bank money received from events and appeals
- Raise and process all invoices for fundraising events
- Assist the Retail Manager to reconcile weekly hospice shop takings and monthly petty cash records as required
- Provide relevant information about how figures are generated, as required
- Investigate and resolve any fundraising financial queries
- Update and maintain desk file
- Preparation of Arohanui invoices (AR) for approval and maintenance of appropriate filing systems;
- Manage internal and external account enquires as required;
- Action all account reconciliations, ensure accurate GL coding's and certify all invoices for payment before final approval obtained (AP);
- Assist with monthly reporting and annual financial audit preparation includes updating and maintaining appropriate spreadsheets and databases as required;
- Assist with archiving of financial accounts, statements, PAYE/GST and Corporate;
- Services correspondence/documents to meet archiving requirements;

### **General Administration**

- Maintenance of the Foundation (Fundraising) filing requirements, bring ups and archiving
- Be the first point of contact for all queries into the section.
- Assist with annual budgeting processes, loading to xero and phasing

### **To demonstrate acceptance and understanding of the Treaty of Waitangi and its principles**

- Integrate the principles of the Treaty of Waitangi into practice wherever practical
- Is aware of appropriate cultural protocols and practices of Arohanui Hospice services.
- Develops partnerships with AH teams and stakeholders as appropriate.
- Special mention, in-house Insurance expert

### **Health and Safety**

- Take responsibility for the health and safety of yourself and others, in partnership with the organisation
- Ensure all hazards are identified and reported.

<b>PERSON SPECIFICATIONS</b>
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- Proven broad administrative skill and experience particularly in the areas of financial accounting
- Knowledge and experience of financial planning and accounting systems with experience in performance reporting cycles and systems an advantage
- Proven ability to develop and establish workable databases, systems, spreadsheets and processes
- Sound experience and knowledge of all Microsoft Office systems and ability to learn new systems
- Ability to successfully resolve issues and problems
- Ability to cope under pressure and multi task
- Proven ability in using initiative
- High degree of professionalism and confidentiality
- Process driven with a strong focus on attention to detail
- High standard of communication skills, both written and verbal

**SIGNATURES**

**Supervisors Name**

**Signature**

**Date:**

**Position Holders Name**

**Signature**

**Date**