# JOB DESCRIPTION

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| **POSITION** | Salesforce Systems Administrator |
| **GROUP** | Fundraising & Communications |
| **BUSINESS UNIT** | Fundraising & Communications |
| **RESPONSIBLE TO** | Bequest Manager |
| **LAST UPDATED** | June 2025 |

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| **Our Vision**  We are a trusted and reliable ambulance service providing excellence in emergency response and connected services that move our communities to better health.  **Our Purpose**  Wellington Free Ambulance exists to deliver an ambulance service that excels in emergency response and clinical communications underpinned by proactive partnerships to deliver equitable health and wellbeing outcomes for our community.  **Our Values**  **Values** |

## Job Purpose

As our organisation expands its fundraising efforts and relies heavily on Salesforce to manage donor relationships, campaigns, and reporting. In partnership with an external Salesforce consultancy providing managed support, this role would ensure day-to-day Salesforce management, optimize fundraising workflows, and serve as the liaison between the WFA Fundraising team and the external consultancy.

The Salesforce System Administrator will ensure that we effectively leverage Salesforce to enhance fundraising performance, maintain data integrity, and optimize the support provided by our external consultancy. This approach will allow our fundraising team to focus on strategic tasks while ensuring that Salesforce remains fully functional and aligned with our fundraising goals.

## Job Scope

The role sits within the Fundraising team but will require interaction with other business units.

In 2024, WFA migrated its donor management function from the existing Salesforce Nonprofit Success Pack (NPSP) to Salesforce Nonprofit Cloud. Following the migration, the need for a dedicated Salesforce Administrator working alongside our Fundraising and Communications team has become essential to optimise the investment and more fully realise the benefits of the new system and its capabilities.

The key aim for this Salesforce Administrator role is to:

* Support the organisation to maintain, continually improve, and enhance our Salesforce Nonprofit Cloud system, ensuring it remains a reliable and effective tool.
* Work with the external consultancy and Fundraising and Communications team to prioritise and deliver the backlog of changes and future enhancements.
* Collaborate with other business units to optimise workflows and explore opportunities for improvements.

## Context that this role operates within

### Organisational perspective

Wellington Free Ambulance (WFA) is the only emergency ambulance service for Greater Wellington and Wairarapa, a population of around 500,000 people.

As well as over 53,000 emergency ambulance responses annually, WFA operates a clinical communications centre, answering over 235,000 calls a year, provides over 40,000 patient transfers for people to attend scheduled medical appointments, and provides medical event services to thousands of people at over 500 events across the region.

For almost 100 years WFA has proudly honoured the founding principle of our organisation to provide a free and accessible emergency health service to our community.

As an essential health service, WFA receives around 82% of our funding from Government and ACC contracts. The community contributes over $7 million each year through fundraising to ensure WFA services can remain free of charge.

### Business Unit Perspective

The Fundraising and Communications team work hand in hand. Our communications are geared towards strengthening awareness of community expectations of service delivery and building relationships with our donors and supporters.

Our fundraising task is a big one. We must raise over $7 million each year to meet the difference between government funding and what it costs to run the service. This comes from a mix of generous individual and business donors, regular givers, bequests, community fundraising, trusts and foundations and more.

## Key accountabilities

| Key result area | Accountabilities |
| --- | --- |
| * **Support and User Training**   Act as initial support contact for Salesforce-related issues, ensuring prompt investigation and resolution.  Provide ongoing user training to promote effective and consistent use of Salesforce across the Fundraising team. Develop and maintain clear user documentation | * Serve as the primary support contact for Salesforce and provide e the necessary technical support to the Fundraising team. * Work closely with the team to streamline processes, resolve issues, and enable them to focus on their core responsibilities. * User documentation is maintained, ensuring it is regularly reviewed and updated to reflect system changes, new features, automation, and evolving business processes. * Provide recommendations for system improvement. * Handle routine tasks such as user management, data integrity checks, campaign data reporting, minor system adjustments, and handling user issues in a timely manner. |
| * **Maximizing of Consultancy Engagement**   Ensure that the consultancy’s time is focused on strategic, high-impact projects by managing day-to-day system operations in-house and serving as a technical bridge between the team and the consultancy. | * Take responsibility for routine in-house tasks to ensure that the consultancy’s time is used efficiently for more complex initiatives, without overwhelming the fundraising team with technical details. * Liaise with external consultancy to escalate complex Salesforce issues or initiate system enhancements, ensuring comprehensive task descriptions and effective Jira board management. |
| 1. **Data Integrity, Compliance and Reporting**   Implement data hygiene practices to ensure accurate donor records, including regular data cleansing, deduplication, and compliance monitoring. | * Maintaining accurate donor records and ensuring compliance with data protection regulations * Data governance responsibilities, ensuring that our data is consistently clean, compliant, and ready for analysis and reporting. * Regularly run reports, export data as needed and maintain dashboards to ensure accurate and up-to-date visibility of metrics |
| * **Customization and Process Automation**   Continuously adjust Salesforce settings and workflows to fit fundraising needs, while coordinating with the external consultancy for larger-scale customizations and system upgrades. | * Identify opportunities for automation, streamline workflows, and manage custom objects, reports, and dashboards in real-time, while coordinating with the external consultancy for larger projects or developments. |
| * **Relationship Management**   Stakeholders are positively engaged and productive and enduring relationships with stakeholders are formed.  Workshops and communications are targeted, productive and results focused.  WFA is trusted and respected by internal and external stakeholders. | * Develop and maintain strong, positive relationships with internal and external project stakeholders, and manage their expectations. * Tailor communications to target audiences and lead workshops and conversations about needs, solution options and project development. * Proactively identify problems and opportunities disclosed and work to escalate these for evaluation and progression. |

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## Relationships and delegations

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| Reporting Structure | **Manager:** | Bequest Manager |
| **Peers:** | Fundraising and Communications team, IT team, Finance team, Data team. |
| **Direct Reports:** | Nil |
| Key relationships | **Internal:** | Finance Team; Digital & Data Team, Operational users, Senior Leadership Team, Programme Delivery Team, PSN Programme Team |
| **External:** | Service and Support Providers |
| delegations & authorities | **Delegation Level:** | As per the delegations letter (if any) agreed with you in writing during your employment, and subject to CEO approval at all times |

## Capability profile

### Competencies

Competent performance in the role requires demonstration of the following competencies. These competencies provide a framework for selection and development.

| Core Competency | Key Behaviours |
| --- | --- |
| **Ensures Accountability** | * Assumes responsibility for the outcomes of others * Promotes a sense of urgency and establishes and enforces individual accountability in the team * Works with people to establish explicit performance standards * Is completely on top of what is going on and knows where things stand * Provides balanced feedback at the most critical times |
| **Communicates Effectively** | * Delivers messages in a clear, compelling, and concise manner * Actively listens and checks for understanding * Articulates messages in a way that is broadly understandable * Adjusts communication content and style to meet the needs of diverse stakeholders * Models and encourages the expression of diverse ideas and opinions |
| **Organised** | * Is organised and takes a structured approach to tasks/goals. * Plans effectively and manages resources and execution appropriately to ensure tasks are delivered on time. |
| **Resourcefulness** | * Gets the most out of available resources and secures rare resources others can’t get * Adapts quickly to changing resource requirements * Enjoys multi-tasking; applies knowledge of the organisation to advance multiple objectives |
| **Being Resilient** | * Stays focused and composed in stressful situations * Maintains a positive attitude and forward-thinking approach despite troubling circumstances or setbacks * Takes constructive action to navigate difficulties or obstacles * Is viewed as a source of confidence in high-stress situations |
| **Strategic Mind set** | * Sees the big picture, constantly imagines future scenarios, and creates strategies to sustain competitive advantage * Is a visionary and able to articulately paint credible pictures and visions of possibilities and likelihoods * Formulates a clear strategy and maps the aggressive steps that will clearly accelerate the organisation towards its strategic goals |
| **Drives Results** | * Sets aggressive goals and has high standards * Is consistently one of the top performers * Pursues everything with energy, drive, and the need to finish * Persists in the face of challenges and setbacks * Always keeps the end in sight; puts in extra effort to meet deadlines |
| **Te Tiriti o Waitangi and Cultural Expertise** | * Demonstrates understanding of the principles of te Tiriti o Waitangi and their contemporary application to WFA’s work * Applies tikanga in relevant work situations |
| **Cultural Competencies** | * Wellington Free Ambulance is committed to its responsibility to Māori and its responsibility to Pasifika. There is an expectation of continued learning and development of all staff in this area. |

## Other aspects of capability not covered by the above competencies

### Knowledge and Experience

| Essential | Desirable |
| --- | --- |
| * A strong understanding of the Salesforce platform, including key features and functionalities * Experience or familiarity with system administration tasks (e.g., user management, workflows, process builder, flows). * Analytical mindset with excellent problem-solving skills * Strong communication skills to collaborate with cross-functional teams and explain technical concepts to non-technical stakeholders. * Ability to prioritise tasks and work independently in a fast-paced environment. * Understanding of business processes | * Experience with Salesforce Nonprofit Cloud * At least 12 months experience as a Salesforce Administrator * Experience in a nonprofit environment, especially with fundraising or donor management systems * Knowledge of fundraising concepts, donor journeys, and campaign management * Understanding of data structures, data quality, and reporting. * Completion of Salesforce Trailhead courses * Enthusiasm for learning and growing within the Salesforce ecosystem * Experience with using and maintaining Trello, JIRA |

### Professional Qualifications

| Essential | Desirable |
| --- | --- |
| * Salesforce Certified Administrator * Database / CRM experience | * Business Analyst certification * Not for Profit experience |

The normal working week will be Monday to Friday; however, the nature of the duties may require work outside the normal hours from time to time.

### Changes to Job Description

From time to time as an organisation evolves job descriptions may need to be reviewed and may need to be changed. Such changes may be initiated as necessary by the manager of this position in consultation with the employee. This job description may also be reviewed as part of the preparation for performance planning for the annual performance cycle.

Employees may be measured against core competencies as part of their performance development.