

Job Description

Position: Individual Giving Specialist
Location: Auckland
Reports to: Fundraising Manager
Team: Public Engagement
Direct reports: 0
Grade: 16

MHF PURPOSE

Whakataukī

Mauri Tū, Mauri Ora (Creating space for, and unleashing the life force found in all things).

Mission

Our whakataukī informs the Mental Health Foundation's (MHF) mission: "Lift the mental health and wellbeing of all people in Aotearoa New Zealand."

Te Tiriti

Advance MHF's tangata Te Tiriti journey and partnership with Māori through MHFs partnership/s and practices.

Values

All MHF staff members, processes and relationships aim to work in ways that align with the MHF organisational values:

Ōriteanga - fairness and equity

Tika, Pono, Aroha - respect, truthfulness, compassion

Whanaungatanga - trusted relationships, whānau-centred

Te Pae Tawhiti - innovation

Toitū - sustainability

Organisational expectations and performance indicators

- Demonstrates strong interpersonal skills with the ability to communicate with a wide range of individuals effectively and courageously in a diverse environment.
- Able to manage time by organising and planning effectively (e.g. prioritising, project management, meeting deadlines, being at work and meetings on time).
- Delivered work to the level of quality expected, on time and within budget.
- Operates in a manner that recognises and upholds the significance of being a committed Te Tiriti partner.

- Adheres to MHF's policies and procedures.

ROLE PURPOSE

The Individual Giving Specialist role's purpose is to deliver MHF's Individual Giving programs in line with the Fundraising strategy. In collaboration with the Fundraising Manager, this role implements appeals, regular giving, digital fundraising and other associated campaigns.

The Individual Giving Specialist will also work with fundraising staff, contractors or other agencies to create and monitor the performance of these programs reporting back to the Fundraising Manager. It will help guide content development for fundraising assets, developing meaningful and impactful donor journeys and working collaboratively on data and reporting.

Key Internal Relationships

- Public Engagement team
- Organisational Services team
- Policy and Advocacy team
- Programmes and Resources team
- People and Culture team

Key External Relationships

- External agencies such as telemarketing and other suppliers of inputs to fundraising programmes.
- Donors/ potential donors and supporters across programmes such as regular giving & appeals.
- Fundraising NGO's professional community

RESPONSIBILITIES:

Fundraising

- In collaboration with the Fundraising Manager, lead and implement the strategy for Individual Giving, aiming to increase revenue, including managing all timelines and budgets.
- Monitor and meet income and expenditure targets monthly.
- Support the Fundraising Manager to develop the annual fundraising budget.
- Ensure target audiences are reached and engaged early and often.

Donor Journeys

- Plan, implement and lead all donor journeys for Individual Giving with support from the Fundraising Manager and relevant communications team

members, ensuring communications are engaging and strengthen donor relationships.

- In collaboration with communications team members, develop impactful fundraising stories that reflect MHF's mission and values.
- In collaboration with communications team members, produce, edit, and develop relevant Individual Giving marketing and communication assets, including all design elements, key messages, donor journey communications, and any other copy and web collateral.
- Provide clear, timely and detailed briefs to relevant members in the Fundraising & Marketing team and/or external providers for any relevant publications, promotional or communications materials.
- Provide a fundraising lens and relevant recommendations to content developers as required.

Project Management

- Utilise project management tools with internal and external stakeholders to work to deadlines and budget requirements.
- Ensure effective communication and collaboration takes place within the Marketing and Fundraising team and across the wider organisation.
- Brief the Marketing and Fundraising team and other organisational stakeholders on Individual Giving events and programs to ensure those who engage with the public have the information they need to respond appropriately.
- Effectively manage self to ensure all tasks and requirements meet deadlines and are delivered in a timely manner.
- Escalate any issues to the Fundraising Manager for support, keeping them abreast of any developments as and when necessary.

Relationship Management

- Develop and maintain both internal and external relationships that contribute to the performance of Individual Giving.
- Oversee or lead relevant internal and external stakeholder management including project meetings and regular WIPs for Individual Giving.
- Identify and manage supplier agreements for external partners.

Data & Reporting:

- Work collaboratively with the Digital Marketing team to prepare and review data as required for Individual Giving.
- Support the Fundraising Manager with any reporting KPIs and evaluation of programs, using insights to inform future work.
- Keep track of the performance of Individual Giving programs and report performance to the Fundraising Manager.
- Work with the Digital Marketing team to ensure data provided is accurate, data extractions are valid, and data hygiene is regularly practiced.

Administration:

- Support with the creation of supplier agreements for key external partners.
- Work alongside the Fundraising Donor Relationship Coordinator to support with donor interactions when required.
- Seek learning opportunities to develop and maintain own professional development.
- Complete any other tasks that are reasonably required from the Fundraising Manager or marketing and fundraising team.
- All staff at the MHF are required to manage their own files, this includes format naming, dating and saving all work correctly in the shared SharePoint structure.

PERSON SPECIFICATION

Essential Criteria:

- At least 2 years experience in a role leading or advising on Individual Giving including in the areas of regular giving, appeals and/or digital fundraising
- Confident and knowledgeable in best practice fundraising and Individual Giving processes
- Confident using fundraising CRMs
- Demonstrated project management experience and skills
- Exceptional writing and interpersonal skills
- Ability to engage with different stakeholders
- Ability to guide and collaborate with others to produce fundraising and/or marketing materials
- Understanding of, and experience with people from a wide range of cultures/ethnicities and life experiences
- Willingness to grow and extend knowledge of Te Ao Māori and Te Reo Māori
- Willingness to extend and grow in the fundraising space

Desirable Criteria:

- Tertiary qualification or relevant industry experience in Fundraising, Marketing or Communications – or a related discipline is highly desirable
- Experience with supporter acquisition and engagement strategies
- Experience in health promotion/population health approaches
- Knowledge of te ao Māori and te reo Māori
- Experience using project management tools such as ClickUp
- Experience using CMS tools such as Salesforce and Marketing Cloud.