



POSITION DESCRIPTION

Job Title:	Individual and Regular Giving Specialist
Team/Group:	Fundraising and Partnerships
Job Reports to:	Individual and Regular Giving Lead
Location:	Kalmia Office, Ellerslie
Group objective	To deliver sustainable net voluntary income by engaging the New Zealand public in fundraising for the Heart Foundation through direct and relation-based programmes. Additionally, a key focus is to maximise the contribution from key partners to the Heart Foundation's strategic goals and engagement deliverables.
Job Purpose/Objective:	This role will play a key part in managing the delivery of the Heart Foundation's Direct Marketing activities for Individual and Regular Giving programmes. Reporting to the Individual and Regular Giving Lead, this role works alongside the Individual and Regular Giving Co-ordinator to manage the effective and timely delivery of all direct marketing, communications, and operational requirements for Individual and Regular Giving programmes and donors.
Reporting Structure	No direct reports
Key Responsibilities/Tasks:	Campaign Project Management • Day-to-day management of direct marketing campaigns, including preparing timelines and briefs, coordinating with internal teams, external suppliers, and stakeholders to ensure best-in-class campaigns are delivered on time and to budget. • Coordinate creative briefing, concept copy, and artwork development. Ensure execution reflects agreed tone, purpose, and stakeholder feedback. • Oversee print production and mailhouse services, including costs, print quality and accuracy, postage rates, and on-time delivery. • Prepare campaign data briefs using established segmentation and formatting requirements, with oversight and strategic input from the Individual and Regular Giving Lead. • Work with internal data and external mailhouse teams to ensure comprehensive campaign setups in CRM, correct data formatting, accuracy and cleanliness, and postal compliance.



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- Forward plan for and source campaign content, including identifying potential case studies and donor impact stories, in collaboration with the Individual and Regular Giving Lead, Fundraising Copywriter and liaising with Marketing and Communication, Care and Support, and Prevention teams as needed.
- Execute direct marketing strategies for acquisition, including coordinating with external media and data agencies.
- Execute and maintain donor journeys as defined by the Individual and Regular Giving Lead. Implement updates across all touchpoints including email, direct mail, website, and digital media.
- Apply donor segmentation to tailor messaging across multiple channels including direct mail, email, website, and social media.
- Monitor and compile donor feedback and campaign interactions to inform journey refinement and improve overall experience.

Measuring Effectiveness

- Contribute to the continuous review, assessment, and analysis of all direct marketing activity for the Individual and Regular Giving programmes to ensure future communications and campaigns are as powerful and effective as possible.
- Ensure internal dashboards, reports, and analytics tools provide accurate and timely data for campaign evaluation and meet the requirements of the Individual and Regular Giving programmes.
- Collect, collate, analyse, and report on key measurements for the Individual and Regular Giving programmes. Brief the Data Services team to provide or update reporting as needed and share results with the Individual and Regular Giving Lead to inform strategic decisions.
- Conduct regular, systematic A/B and multivariate testing to optimise direct mail packs, donation landing pages, email content, and digital campaigns. Ensure test results are captured and recorded for reporting and analysis of trends.
- Understand best practice and stay current with emerging trends across fundraising and digital marketing.

Supplier Coordination and Training

- Day-to-day management of supplier activities to ensure seamless campaign execution and continuous improvement, including running WIP meetings and following up on action points
- Update and maintain supplier / external agency training materials and collateral ensuring content is relevant and up to date.



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	- Organise, set up and coordinate online or onsite training sessions for external fundraising agencies and suppliers. Supporter Experience and Stakeholder Engagement - Create and share briefs with Supporter Care and other stakeholders for all appeals, new campaigns and communications, changes to processes etc. - Share new campaigns and communications with external suppliers in accordance with approved plans and timelines. - Handle Supporter Care queries, feedback, or complaints escalated by the Individual and Regular Giving Coordinator. Respond directly where appropriate or manage through agreed processes. - Handle escalated queries and issues related to the website, CRM and other processes or channels. Resolve directly where appropriate or manage through agreed processes. Fundraising and Partnerships Teamwork - Work alongside internal stakeholders supporting the Individual and Regular Giving programmes such as Supporter Care, Graphic Designer, Fundraising Copywriter, Data Services and Marketing and Communications. - Work alongside the Fundraising Specialist - Lottery and Events Fundraising Lead on data briefs when donor audiences will be touched with Individual and Regular Giving activity - Work alongside the Philanthropy Specialist on high-value donor inclusion and bequest development - Contribute and support the wider Fundraising and Partnerships team as required and provide support and cover as directed by the Head of Fundraising and Partnerships.
Key Relationships: Internal/External	Internal relationships: This position reports to the Individual and Regular Giving Lead. The linkages are to the following: - Fundraising & Partnerships Team - Shared Services Team - Marketing & Communications Team - Medical Director - Prevention and Care & Support - Regional operations



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	• HF staff and volunteers <u>External:</u> External relationships: Key relationships must be maintained with appropriate individuals and organisations outside the Heart Foundation: • Agencies • Suppliers • Other consultants as required, in support of the Individual and Regular Giving Lead
Key Capabilities needed to succeed: Including qualifications, experience and skills	<u>Experience /Skills (includes Qualifications):</u> Essential • Relevant Marketing Degree or equivalent Experience • Minimum two years' experience in Direct Marketing or Fundraising. • Experience managing marketing or project budgets. • Experience working in a data-driven environment. • Experience and confidence in working with marketing or fundraising CRM/databases. • Strong consumer/supporter focus. • Creative and innovative. Skills • Highly organised, with experience managing multiple projects under pressure. • Ability to work effectively to tight deadlines and be agile in managing possible setbacks. • Excellent understanding of key metrics for engagement and conversion, and the ability to analyse data and reporting to inform data-driven fundraising decisions. • Understanding of donor/audience needs, behaviour and motivations to provide best-in-class donor/audience experience. • Ability to develop high-quality relationships with internal and external stakeholders. • Solid budgeting skills, including commercial and financial acumen.



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	• Excellent understanding of and attention to detail across all areas of direct marketing. • Highly computer literate, including advanced Microsoft Word and Excel skills. • Good problem-solving and analytical skills. Preferred • Experience of working within a charity direct marketing operation. • Experience in digital marketing. • Understanding of good fundraising copywriting.
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The job description above gives a general overview of the role and level of work to be performed by the incumbent. It is not a prescriptive list of all responsibilities and skills required. Reasonable changes to the role may be made if appropriate.