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| **Job title** | **Direct Fundraising Coordinator – Individual and Regular Giving** |
| **Group** | Fundraising and Partnerships |
| **Job reports to** | Direct Fundraising Lead - Individual and Regular Giving |
| **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** | This role supports the delivery of Direct Marketing activities for the Heart Foundation Individual and Regular Giving programmes.  The role supports the Direct Fundraising Lead – Individual and Regular Giving and works closely with the Direct Fundraising Specialist – Individual and Regular Giving to coordinate campaigns, support stakeholders, assist with data and reporting tasks, and manage administrative functions. |
| **Reporting structure** | No direct reports |
| **Key responsibilities / tasks** | **Campaign Project Management Support**   * Share project timelines and key dates with internal teams and external suppliers * Ensure correct and consistent set-up of appeal and campaign details in CRM, e.g. campaign codes, source codes, go-live and end dates etc. are aligned to brief * Monitor campaign timelines and deliverables, sending reminders and following up with stakeholders and suppliers on overdue tasks or unanswered messages, escalating delays as needed * Assist with sharing of creative for review, deadline reminders, following up on feedback, checking revisions and proofing of final art * Assist with print production including booking printing, requesting quotes, sharing stock codes, following up on delays, and checking proofs as required * Review and spot check all data files for mailings and emails to ensure data is clean, correct, formatted for purpose, and meets all brief requirements. * Schedule and attend internal and external (as required) WIP meetings, write up and share meeting notes, updates and action points with stakeholders, and help to ensure actions are delivered on time * Assist with compiling donor interactions and feedback * Check and proof all Individual and Regular Giving direct marketing collateral and supporter communications * Pre-launch check all digital and email campaigns. Including: testing all email links, donation form URLs and tracking, confirming donation form functionality across devices and browsers, and testing and proofing thank-you pages and auto-responder emails * Check and sign off bi-weekly mailing files * Follow best practice and emerging trends across fundraising and digital marketing.   **Testing, reporting and administration**   * Prepare campaign budgets. Track costs per-campaign and for Individual and Regular Giving programmes overall. Ensure quotes do not exceed budget, highlight underspend, and check invoices match quoted costs. * Monitor exceptions reports alerts and manage through agreed processes * Prepare weekly WIP figures and other ad-hoc reports or figures as requested * Prepare and send weekly RG cancellation reports and monthly reinstated donor reports * Assist with resolving processing issues and delays, including providing information to suppliers, ensuring details are captured in CRM, and keeping stakeholders informed. * Assist with sharing weekly fundraiser location notices and updates with Supporter Care team, regional Heart Foundation offices, Marketing and Communication team for website updates and others as required. * Assist with recurring file upload processes * Other admin, testing or reporting as requested by Direct Fundraising Lead – Individual and Regular Giving.   **Supplier Coordination and Training**   * Prepare presentations and other items or materials as required for online or onsite training sessions * Assist with online or onsite training sessions for external fundraising agencies and suppliers, including booking meeting rooms and catering and on the day set up.   **Collateral management**   * Update and maintain content in SharePoint folders, including briefs, final art, and templates * Maintain appeal mail pack samples folders * Maintain all collateral, including that used by external supplier ensuring content is up-to-date and relevant. Manage requests for replacement or additional collateral. Work with Direct Fundraising Specialist – Individual and Regular Giving to produce new or updated materials as required * Manage off-site stock levels, reordering and destruction of printed material.   **Supporter Experience and Stakeholder Engagement**   * Be the first point of contact for all Supporter Care queries, external feedback or complaints relating to Individual or Regular Giving and respond, redirect, or escalate to the Direct Fundraising Specialist - Individual and Regular Giving or Direct Fundraising Lead - Individual and Regular Giving as appropriate * Be the first point of contact for queries or minor issues relating to the website, CRM and other processes or channels. Respond, redirect, or escalate to the Direct Fundraising Specialist - Individual and Regular Giving or Direct Fundraising Lead - Individual and Regular Giving as appropriate. |
| **Key relationships**  **Internal / external** | **Internal**   * Graphic Designer * Fundraising Copywriter * Direct Fundraising Lottery team * Supporter Care team * Direct Fundraising team * Data Services team * Philanthropy and Partnership team * Medical Director and Research Grants Liaison * Marketing and Communications team * Finance * Regional operations * IT Services team * HF staff and volunteers.   **External**   * Agencies/ Suppliers * Other consultants as required, in support of the Direct Fundraising Lead - Individual and Regular Giving. |
| **Key capabilities needed to succeed**  Including qualifications, experience and skills | **Essential**   * Relevant Marketing Degree or equivalent   **Experience**   * Experience in managing or supporting direct marketing campaigns * Experience working within a charity direct marketing operation highly advantageous * Highly organised, experienced working under pressure * Understanding of good fundraising copywriting * Strong consumer / donor focus * Understanding of fundraising or marketing data.   **Skills**   * Demonstrates excellent communication skills (listening, oral and written) * Collaborative and a team player, enjoying working with others to achieve optimal results * Ability to develop high quality relationships with internal and external stakeholders * Demonstrates the ability to effectively plan, prioritise and co-ordinate a complex workload, undertake and manage multiple priorities * Ability to work effectively to tight deadlines regardless of possible setbacks * Good problem solving and analytical skills * Exceptional time management * Excellent attention to detail * Creative and innovative * Highly computer literate, including advanced word, CRM and Excel skills. |
| **Our Values** | The Heart Foundation is a for purpose organisation and has identified three underpinning values, which it upholds in all its operations.  |  |  | | --- | --- | |  | **CONNECTED: INSIDE AND OUT**  Our desire to stop New Zealanders dying prematurely from heart disease is a collaborative effort. We work in strong effective teams to get the job done to the highest standard. We look for opportunities to create partnerships with other organisations and in our communities, to come together and really make an impact. | |  | **PUMPING: PASSIONATE FOR CHANGE**  We are alive with ideas and inspiration to help people to fulfil their lifetimes. We excel at initiating conversations and stimulating change. The fact that we are not done yet gives us energy and drive to enrich the nation’s heart health with vigour. We relish what we do and thrive on making a difference. | |  | **REAL:  LIVE IT, BREATHE IT**  We walk the talk. We always strive to deliver on our promises and do what we say we’re going to do. Our professionalism and dedication shines through in every interaction. We’re a credible and respected voice. | |

*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.*