



POSITION DESCRIPTION

Be part of our mission:

***To improve the lives of vulnerable people
by mobilising the power of humanity
and enhancing community resilience.***

To find out more about our kaupapa, and what we stand for, visit redcross.org.nz

Job Title: **Advisor Philanthropy**
Group: **Engagement and Enterprise**
Location: **Auckland**
Reports to: **Manager, Planned Giving**
Position status: **Permanent, Full-time**
Version date: 22 August 2022

OUR PURPOSE

New Zealand Red Cross (NZRC) has always been about good people doing good things. We're part of the world's largest humanitarian network, helping vulnerable people and those affected by disaster and conflicts. We've been working in New Zealand for more than a century and today you'll find us lending a hand in communities throughout Aotearoa New Zealand – we're here for good.

DIVERSITY AND INCLUSION

We are committed to providing an environment where all people feel welcomed, valued and seen in their identities.

THE TREATY OF WAITANGI

New Zealand Red Cross is working towards understanding our obligations under the Te Tiriti o Waitangi principles. New Zealand Red Cross engagement with Te Tiriti o Waitangi is recognised as ethical best practice in relation to the application of the Red Cross Fundamental Principles and the desire of New Zealand Red Cross people to build meaningful relationships with Māori as tāngata whenua.

WHAT WE STAND FOR

The Red Cross Fundamental Principles guide all we do, whether we're helping people in New Zealand communities or providing urgent relief in an international disaster.

ABOUT THE GROUP

Engagement and Enterprise

The Engagement and Enterprise Group has four core functions. The Communications, Marketing and Engagement directorate supports and enables organisational communications (both internal and external) as well as raising public awareness. The Philanthropy directorate supports and enables organisational fundraising efforts across a portfolio of different fundraising products and activities. The First Aid directorate is responsible for the creation of revenue through the delivery of first aid training and the sale of first aid related products. The Retail directorate is responsible for the creation of revenue through the sale of donated products through about 50 Red Cross shops across the country.

POSITION PURPOSE

The Advisor Philanthropy will work alongside a team of fundraising professionals and will take responsibility for the effective relationship development of New Zealand Red Cross' donors, supporters and members in order to influence and attract both significant personal gifts and/or pledges of a gift in their Will to New Zealand Red Cross. This role will be responsible for the hands-on relationship management of a portfolio of donors and prospects.

KEY RESPONSIBILITIES

- Developing and maintaining respectful relationships with identified donors, supporters and members that will assist them by cementing and growing their understanding surrounding the work of New Zealand Red Cross.
- Actively soliciting significant gifts and bequest pledges to benefit and enhance New Zealand Red Cross ability to deliver humanitarian services.
- Pro-actively establish, develop and managing a programme of interaction with both individuals and groups, including the organisation of appropriate events and presentations.

Responsibilities

- Managing the pipeline of engagement with identified donors, supporters, members, and prospects for the purpose of cultivating and stewarding their support for New Zealand Red Cross.
- Identifying, developing, maintaining, and growing relationships with prospective significant level donors and bequestors in order to obtain their financial support through significant gifts and/or pledges of a gift in their Will to New Zealand Red Cross.
- Work in concert with New Zealand Red Cross colleagues engaged in local, regional and national fundraising activities and initiatives.
- Prompt tailored and personalised engagement and acknowledgment of donor, member and prospect interactions, pledges and/or committed bequests.
- Utilising appropriate promotional material, communications and events to develop and enhance relationships.
- Relationship building with law firms and trusts who may influence bequests.

- Providing guidance and understanding of the importance and value of significant gifts and bequests to New Zealand Red Cross' internal stakeholders – encouraging them to promote bequest giving to New Zealand Red Cross.
- Ensuring that processes are followed to ensure all donor, supporter and member interactions and engagements are documented appropriately and handled with the utmost respect.
- Producing regular and/or other reports as required to reflect caseload activity and performance.
- Working closely with colleagues in the wider fundraising team, including the Supporter Care and Database management team in order to manage existing relationships with donors.

General

- Contribute to the ongoing development of philanthropic initiatives in line with the national fundraising strategy, offering a portfolio of tailored philanthropy products.
- Support the Individual Giving team to undertake donor stewardship and solutions to a high level.
- Keep the Individual Giving Manager abreast of key tasks, potential and emerging risks and issues.
- Perform other communications and development activities as required, work as part of the Fundraising, Marketing and Communications team and contribute to achieving overall team goals.

HEALTH SAFETY AND WELLBEING

- Proactively ensure your actions or omissions do not adversely affect the Health, Safety and Wellbeing (HSW) of yourself or others.
- Participate in HSW induction, training, programmes and activities.
- Follow all reasonable instructions to comply with HSW legislation and regulations.
- Follow NZRC HSW policies, standards and procedures.
- Do not undertake any activities you are not adequately trained for.
- Use designated personal protective equipment (PPE) for specific work activities.
- Report hazards/risks, incidents and near misses as soon as possible after the event.

RELATIONSHIPS

Internal

Manager Individual Giving
 Director Philanthropy
 Manager Philanthropic Partnerships
 Manager Supporter Care
 Team Leader Regular Giving
 Advisor Community Fundraising

External

Potential donors
 Supporters

PEOPLE

Direct

Nil

Indirect

Nil

Volunteers

PERSON SPECIFICATION

Knowledge

- Sound knowledge of financial literacy.
- A sound understanding of the refugee settlement process.
- A strong understanding of successful training practices and pedagogy principles.

Qualifications and/or experience

- Educated to a level that ensures appropriate and empathetic communication and engagement with people across all socio-economic levels.

Skills and other attributes

- A proven record of successful legacy donor stewardship and acquisition.
- Demonstrated ability of being able to make an ask for a significant gift
- A good understanding and knowledge of sales.
- A track record of successful customer relationships.
- A preferred understanding of the principles of fundraising within the charitable sector.
- A proven ability to develop and successfully deliver a programme of work.
- Strong interpersonal skills across many levels of society in order to develop strong relationships.
- Excellent communication skills.
- Experience in developing and preparing a case for support and in soliciting significant gifts and bequests appropriately, at the right level and at the right time.
- An understanding of EEO and Treaty principles and their applications to New Zealand Red Cross.
- Enthusiasm for, and the commitment to, the work of New Zealand Red Cross.
- Self-motivated, as these roles will be largely autonomous.
- An ability to negotiate in a non-confrontational manner and with sensitivity.
- Engaging presentation skills.
- Impeccable personal presentation, time management and accuracy and timeliness in the management of records.
- Excellent written and oral skills.
- Enthusiastic and an active contributor to the wider fundraising team.

TRAVEL

The appointee may be required to undertake travel for this role.

DRIVER LICENCE

A current full car driver licence is required for this role.

DELEGATIONS

Financial: Tier Nil

Employment: Tier Nil

NOTE

This job description is not intended as an exhaustive list of duties and responsibilities. The job is expected to evolve and change, and New Zealand Red Cross may amend this job description after consultation with the job holder.