



NEW ZEALAND
RED CROSS
RIPEKA WHERO AOTEAROA

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: **Manager, Planned Giving**
Group: **Engagement and Enterprise**
Location: **Wellington**
Reports to: **Director Philanthropy**
Position status: **Full-time**
Version date: **February 2025**

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 Manager Planned Giving will lead the strategy, development and growth of NZRC's planned giving programmes, focusing on major gifts and legacies. This role is essential in building long-term, sustainable income by cultivating relationships and managing engagement associated with a large portion of high-net-worth individuals, philanthropists and legacy pledgers.

You will manage a team of four, providing strategic direction and fostering a culture of excellent in donor stewardship and relationship management. The ideal candidate will have a proven track record in major gift and legacy fundraising, excellent interpersonal skills, and the ability to build meaningful, long-term relationships with donors.

KEY RESPONSIBILITIES

Strategic leadership and development

- Develop and implement comprehensive major gifts and legacies programmes that are aligned with NZRC's long-term fundraising objectives.
- Establish, develop and grow sustainable revenue streams from major gifts and legacies programmes.
- Identify new opportunities for growth and innovation, ensuring programmes evolve with donor expectations and sector trends.

Team management

- Effectively lead manage and mentor a team of professional philanthropy staff fundraisers, setting clear objectives and providing regular feedback and coaching
- Foster a collaborative and high-performing team culture, encouraging innovation and best practices in donor engagement and fundraising
- Facilitate cross-departmental collaboration with finance, communications, and programme teams to ensure cohesive and effective fundraising efforts
- Promote, educate and encourage the wider New Zealand Red Cross team to actively be involved and promote the Philanthropy teams products and services
- Work closely with other Philanthropy specialist areas i.e. Direct Marketing, and Regular Giving to ensure the needs of supporters are met and that there is an effective collective supporter lifecycle maintained

- Work closely with the Supporter Care Team to ensure that high value supporter information is maintained and management effectively

Donor cultivation and stewardship

- Be a champion and subject matter expert in relation to the management of a high value supporter portfolio.
- Build and manage relationships with high-net-worth individuals and potential legacy donors, ensuring personalised and meaningful engagement.
- Oversee the ongoing development and delivery of bespoke donor journeys, ensuring excellent stewardship, supporter management and relationship building to enhance donor loyalty and lifetime value.
- Develop and implement recognition strategies to honour and retain major donors and legacy pledgers.

Prospect research and pipeline development

- Lead prospect research efforts to identify and qualify potential major donors and legacy pledgers
- Develop and maintain a strong pipeline of prospects, ensuring continuous engagement and conversion to supporters.
- Oversee donor data management, ensuring accurate records and compliance with data protection regulations.

Legacies Management

- Ensure that operational policies and processes are established and followed to ensure all legacies received are managed with the utmost respect.
- Oversee the management of complex estate matters involving NZRC with sensitivity.

Reporting and performance management

- Monitor and report on KPIs, providing regular updates on income, donor engagement and pipeline developments.
- Manage the planned giving budget, ensuring efficient use of resources and meeting or exceeding income targets.
- Use data and insights to inform decision making and optimise fundraising.
- Keep the Director Philanthropy abreast of key tasks, including potential and emerging risks and issues

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

- Philanthropy leadership team
- Wider Fundraising team
- Communications, Marketing and Engagement team
- Finance team
- Programmes teams
- NZRC membership and people

External

- Third-party agencies
- Major donors
- Legacy pledgers
- Estate planners
- Philanthropic networks

STAFF

Direct

4

Indirect

Nil

PERSON SPECIFICATION

Essential Knowledge, Skills and Experience

- Proven track record in establishing and growing major gifts and legacy giving programmes.
- Demonstrated success in securing significant gifts from high-net-worth individuals and legacy pledgers.
- Leadership experience, with the ability to inspire and develop a team of fundraising professionals.
- Excellent relationship building and interpersonal skills, with the ability to engage, influence, and inspire donors at all levels.
- Strong strategic thinking and planning abilities, with a focus on long-term growth and sustainability.
- Proficient in using donor databases and prospect management and reporting.
- Experience managing budgets and delivering against ambitious income targets.

Desirable Knowledge, Skills and Experience

- Knowledge of estate planning, tax benefits related to planned giving, and relevant legal frameworks.
- Experience in donor stewardship best practices, donor journey mapping, and high-value donor engagement.
- Strong understanding of philanthropic trends and donor motivations within the charitable sector.
- Familiarity with legacy marketing and communications strategies.
- Impeccable personal presentation, time management and accuracy and timeliness in the management of records.
- Excellent staff management and team development skills.
- Excellent communication skills, written and oral, including presentation skills.
- Strong relationship building and interpersonal skills with the ability to engage, influence and inspire donors at all levels.
- Enthusiastic and an active contributor to the wider Philanthropy team
- Enthusiasm for, and the commitment to, the work of New Zealand Red Cross.

TRAVEL

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

DRIVER LICENCE

A current car driver licence is required for this role.

DELEGATIONS

Financial: Tier 4

Employment: Tier 4

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.