

Position Description

Position Title:	Marketing Specialist
Support Function	Finance, Technology and Commercial Function
Reports to:	Marketing Manager
Last review date:	September 2023

He huanui orange mo ngā mokopuna whakatipuranga roto i ngā hapori heke iho, heke iho
Setting the path of wellness in our communities, for the early years, for generations to come

Whānau Āwhina Plunket – who we are and what we are about

Whānau Āwhina Plunket is a charity organisation and the largest service supporting the health and wellbeing of tamariki under-five and their whānau in Aotearoa. We're proud to visit over 82% of all newborn babies in Aotearoa and to support pēpi, tamariki and their whānau.

We aim to be a cohesive and effective national organisation grounded in evidence and best practice, with the needs of New Zealand whānau and families at the centre of everything we do.

Our Whānau Āwhina Plunket Goal

Pae Ora: Healthy Futures:

- **Mauri Ora:** Healthy babies and children
- **Whānau Ora:** Healthy confident families
- **Wai Ora:** Healthy environments and connected communities

We are on a pro-equity journey where we strive to give life to Te Tiriti o Waitangi principles of Tino Rangatiratanga, partnership, active protection, equity and options in our mahi/work to ensure healthy tamariki, confident whānau and connected communities.

Whānau Āwhina Plunket Values

In this role you will be expected to operate in a way that embodies and demonstrates Whānau Āwhina Plunket values as follows:

- **Māia** – to be courageous and lean into discomfort and challenge as we walk the path of pro-equity
- **Tūhono** – to connect and stand in relationship in calm and safe spaces (Āhuru mōwai)
- **Manaaki** – to care, love, nurture, support and enhance mana. To respect mana atua, mana tīpuna, mana whenua, mana tangata
- **Māhaki** – to be humble as we share our knowledge and experience to understand and learn from each other and foster trust

Overview of the Finance, Technology and Commercial Function

This function includes Finance, Digital, Information Technology, Commercial, Property and Fundraising.

We manage the finances and are responsible for making sure that the infrastructure of Whānau Āwhina Plunket, both digital and physical, is fit for purpose and aligned to our service goals.

We work closely with our Service Delivery Leadership colleagues to make sure everything we do helps them to better understand and measure performance, strengthen key relationships locally, secure and diversify revenue sources, manage and leverage Whānau Āwhina Plunket's information to inform decisions, and attract, develop, and retain our people.

Overview of Fundraising Function

The core focus of the Fundraising Team is to generate external funding for Whānau Āwhina Plunket services in addition to contract revenue. This is achieved through best practice fundraising strategies, underpinned by story-led external and internal communications, excellent stakeholder engagement, creative marketing and brand positioning.

The Fundraising Team supports the services delivered to Whānau Āwhina Plunket customers through strategic use of a wide range of channels to support and inform New Zealand families, whānau and communities.

The Fundraising Team is a team of specialist high calibre fundraisers who are focussed on driving the revenue growth forward. You'll be part of a high performing team who deliver across several disciplines:

- Direct Mail
- Regular Giving
- Digital
- Major Donations
- Trusts and foundations
- Bequests
- Partnerships

Purpose of the Position

The Marketing Specialist is a key role within the Fundraising Team, supporting the production of fundraising marketing campaigns, communication touchpoints and the execution and growth of Whānau Āwhina Plunket's Regular Giving strategy.

Reporting to the Marketing Manager, this role will be accountable for liaison with external suppliers and internal stakeholders to produce specific components of broader campaigns such as quarterly direct mail appeals and coordination of national appeal campaign marketing tactics. The Marketing Specialist will also play a key role in the engagement, growth and retention of the regular giving income stream, through a diverse marketing mix, utilising a data-led approach.

This role will oversee the implementation of a Regular Giving strategy and will be the key driver in bringing that strategy to fruition, through best practice fundraising strategies. This role will ensure that our Regular Givers have an exceptional donor journey with Plunket, with customer service being at the forefront of all you do. Understanding the Regular Giving landscape and targeted marketing strategies and leveraging our donor database to create engaging and inspiring donor experiences will be part of the day-to-day job.

Dimensions of the position

Delegations: The position's full delegations are set out in the Schedule of Delegations and may be amended from time to time

Functional relationships: These are the primary positions that this role will coordinate with; the list is not intended to be exhaustive, exclusive, or limiting:

Internal

- Marketing Manager
- Wider Fundraising Team
- Communications Team
- Clinical Leaders
- Finance Team
- All remaining Plunket Business Units & Plunket people

External

- Donors
- Agencies

Key accountabilities

Business as Usual:

- Support the Marketing Manager and Head of Fundraising in developing and documenting a Regular Giving strategy.
- Implement and evaluate Regular Giving programmes;
- Grow the delivery of Regular Giving to support our strategy, ensuring a strong ROI;
- Responsible for management of a new telemarketing programme within the Regular Giving strategic framework;
- Support the Marketing Manager with practical execution of broader Fundraising marketing initiatives, such as the Direct Mail programme and the annual Dunk It For Plunket campaign, including liaison with agencies and suppliers and event microsite editing and content creation.
- Support the growth and retention of supporters, and streamline processes for people to increase or continue donations, through best practice stewardship;
- Being data led and analytical in developing and implementing supporter segmentation, refining the supporter journey, driving growth and increasing lifetime value;
- Support Regular Givers through our fundraising processes, ensuring an excellent donor experience with the Whānau Āwhina Plunket brand;

- Support the implementation of an engaging marketing and communications strategy and plan across the fundraising portfolio, showcasing impact and opportunities for further engagement with the brand;
- Work with the Marketing Manager and Communications Team to ensure appropriate promotion opportunities for Regular Giving initiatives are leveraged
- Work with the Database Manager and Donor Care Coordinator to manage donor and client-to-donor data for the purposes of fundraising marketing and the Regular Giving programme implementation
- Work with the Philanthropy Manager to engage regular givers with other opportunities for giving, including legacies and major gifts;
- Collate impact reports and measures for all Regular Giving initiatives;
- Maintain data processes

Leadership:

- In conjunction with the Marketing Manager, establish annual performance objectives, personal development and training plans;
- Provide leadership and direction to wider fundraising initiatives in Regular Giving using best practices in the fundraising sector;
- Collaborate internally to create a marketing and communications opportunities that will help drive the Regular Giving strategy forward;
- Provide feedback on campaigns in-market and post-execution to improve on subsequent quarterly or annual appeals and events.

Reporting, Analysis, Budgeting and Planning:

- Provide regular analysis, tracking and reports against all objectives and ensure targets are met;
- Monitor and proactively manage financial performance against budget and ensure that variances are managed and reported where appropriate.
- Encourage a culture that prioritises testing, evaluation and continual business process improvement;

Relationship Management:

- Develop and maintain effective relationships with internal and external stakeholders and most importantly, donors;

Organisation and Compliance:

- Comply with financial procedures and processes;

Health & Safety

- Manages own personal health and safety, and takes appropriate action to deal with workplace hazards, accidents and incidents;
- Ensures own and others' safety at all times and observes health and safety practices in all workplace activities;
- Understands the responsibility individuals and their manager play in health and safety; training is up-to-date and can demonstrate actions in an emergency situation that are specific to the workplace and are designed to keep individual safe;
- Complies with relevant safety legislation, policies, procedures, safe systems of work and event

reporting;

- Identifies and reports all incidents, accidents, and near misses in accordance with policy.

Scope of duties

The job holder is expected to perform such other duties as can reasonably be regarded as incidental to the position description, and such other duties reasonably within their experience and capabilities as may be assigned from time to time and following consultation.

Person Specification

Experience, knowledge and skills (including Technical Competencies)

Qualifications:

- Relevant tertiary level qualification is desirable or equivalent experience

Skills & experience:

- A minimum of 2 years' experience in fundraising, marketing or communications;
- Demonstrated project /campaign management experience;
- Experience of creating and executing new fundraising initiatives across multiple channels;
- Liaison with agencies to ensure campaigns and projects are effective;
- Excellent supporter stewardship / customer service skills;
- Ability to generate reports and apply use of data insights strategically to create growth;
- Proven knowledge of lead generation and conversion through business development;
- A self-starter, driven, shows initiative and highly self-motivated;
- High attention to detail and accuracy;
- Demonstrated ability to work both autonomously and collaboratively as part of a team;
- Strong analytical and numeracy skills;
- Good listening, verbal and written communication skills;
- Able to manage expectations and take ownership for results;
- Excellent interpersonal skills, with the ability to achieve positive outcomes;

Desirable

- Raiser's Edge / CRM experience;
- MS Office - Advanced Excel.
- Raisely / Funraisin or other community fundraising web platforms
- Interest in digital marketing for charitable organisations, both industry best practices and new trends or tactics

Other requirements

- Current full NZ driver's license.

Competencies

ACE-Ability

Whānau Āwhina Plunket's behavioural competency model is made up of three dimensions of personal behaviour - Connection to Whānau Āwhina Plunket, Adaptability and Emotional Maturity.

Adaptability

Thinking

- Is comfortable with complexity - understands alternative worldviews;
- Can see beyond face value to identify new, sustainable opportunities;
- Keeps perspective and is pragmatic and solutions focused;
- Able to accept and work with ambiguity and change.

Interpersonal

- Is committed and capable of expanding professional/social networks;
- Is strong enough to confront and deal with difficult people/issues;
- A self-starter who can support and motivate key managers and staff.

Connection to Plunket's Direction

- Has a high level of energy and commitment to achieving Plunket's vision;
- Has a broad range of engagement;
- Is committed to adapting and improving their own practice;
- Is committed to growing the business and developing relationships.

Emotional Maturity

- Is non-reactive and objective and maintains a high level of integrity;
- Understands the degree of influence in their role;
- Understands own limitations.