

ROLE PROFILE: Individual Giving & Legacies Officer

Reports to:	Individual Giving Manager
Department:	Fundraising and Communications
Direct reports:	NA
Salary and hours	£28,000 p.a. Full time

ROLE PURPOSE

The Individual Giving (IG) and Legacies Officer will work closely with the IG Manager and play a pivotal role in growing cash and regular donors and legacy giving for St George's Hospital Charity. This position is crucial to our goal of increasing individual giving from £350,000 to £600,000 and legacies over the next five years.

The postholder will have a strong direct and digital marketing background as they will work closely with the Individual Giving Manager to

- lead marketing initiatives for all IG streams including cash, regular, Payroll Giving, Face to Face, Lottery.
- drive forward seamless automated digital stewardship journeys, and produce engaging campaigns that demonstrate our impact.
- delivering effective digital activities that grow our brand awareness and income from fundraising campaigns

They will also be a strong administrator, with attention to detail leading on administration for Individual Giving and Legacies, working with IG Manager and Fundraising Assistant to ensure online and offline donations are accurately processed, reconciled and uploaded to our database.

MAIN DUTIES & RESPONSIBILITIES

1. Individual Giving

- 1.1. Recruit, engage and mobilise donors to increase income year on year.
- 1.2. Lead on two fundraising campaigns each year, creating communication assets for our website, social media platforms and newsletters.
- 1.3. Ensure our donation platforms are fit for purpose and integrate into our database, with a view to ensuring we have a high donor conversion rate.
- 1.4. Ensure all activities comply with relevant data protection and gift aid legislation, adhering to Fundraising Regulator standards.
- 1.5. Where appropriate, act as a point of contact for external agencies and direct marketing platform providers.
- 1.6. With support from Fundraising Assistant, ensure our administration, record keeping and thanking for all IG activity is accurate and up to date.
- 1.7. Process & record income onto our CRM, including batch uploads.

2. Legacy Giving

- 2.1. Lead on all legacy administration including processing incoming legacy gifts, keeping accurate records, ensure they are allocated correctly and thanked appropriately, where possible.
- 2.2. Liaising with solicitors on open legacy cases and recording updates.
- 2.3. Support IG Manager on legacy marketing materials and campaigns.

3. Donor Journeys

- 3.1. Develop and disseminate key supporter journeys across web, social media and Google Ads
- 3.2. Plan, design, write and deliver automated email supporter journeys for new and existing donors to enhance engagement and retention.
- 3.3. Create engaging communication assets (videos, blog posts, leaflets) for donors and prospective donors that demonstrate the charity's impact.

4. Direct & Digital Marketing

- 4.1. Lead on content creation creatively that will appeal and engage our supporters e.g. social media posts, videos, blog posts
- 4.2. Manage and optimize paid advertising campaigns (e.g., Google Ads, Facebook Ads) to drive traffic and donations.
- 4.3. Liaise with external agencies where necessary.
- 4.4. Update associated webpages e.g. Donate, Leave a Gift in your Will, ensuring these pages are user friendly and accessible with a view to improve conversion rates of people donating online and leaving a gift in their will.
- 4.5. Collaborate with internal teams and hospital staff to research, develop, and deliver new campaigns, messages, or digital products.
- 4.6. Implement tests with clear segmentation and testing matrices to maximize learning and income from each campaign.
- 4.7. Analyse and interpret direct marketing campaign results, producing regular reports that draw conclusions and make recommendations for future activity.
- 4.8. Work with our Database Manager to ensure all campaign data is utilized, captured, and processed efficiently and accurately.
- 4.9. Work with management to develop a digital fundraising plan that is clear and timeline-focussed to grow relevant income streams e.g. legacies and individual giving.
- 4.10. Plan and implement strategies to mobilise supporters via digital channels aiming to increase our newsletter subscribers from 3,000 – 10,000 contacts with a view to convert digital leads into cash donors

5. General Duties

- Participate actively in team meetings, contributing ideas and insights to enhance team performance and collaboration.
- Using our communications toolkit, incorporate our branding and tone of voice across all assets.
- As and when required, provide front desk coverage, welcoming visitors and donors at the Welcome Office and serving as a friendly and helpful representative of the organisation.
- Engage in continuous professional development and participate in regular performance reviews

This is not an exhaustive list of responsibilities. Duties may vary dependent on the needs of the charity.

Person Specification

Skills

- Excellent written and verbal communication skills, with a talent for crafting compelling narratives that resonate with donors.
- Strong relationship skills, with an ability to build rapport and relationships with supporter audiences

to drive income generation.

- Understanding of direct and digital marketing principles, strategies, and best practices to increase income generation
- Strong analytical skills, with the ability to use analytical tools e.g. Google Analytics, Social Media to interpret data and adjust marketing strategies accordingly.
- Strong organisational skills to manage multiple fundraising campaigns and projects simultaneously
- Proficiency in digital marketing tools and CRM systems.
- Problem-solving abilities to develop effective marketing solutions.
- Ability to design creative multimedia digital assets e.g. newsletters, webpages, case studies, videos, reels in line with branding and communication guidelines.

Experience

- Proven experience in direct and digital marketing to increase fundraising income.
- Experience of IG fundraising (acquisition and general appeals) using digital tools to drive donations.
- Experience in updating websites
- Experience integrating digital platforms and CRM databases.
- Demonstrable examples of implementing automated marketing journeys.
- Familiarity with automated marketing systems and stewardship processes.
- Demonstrable success in growing donor bases and increasing individual giving.