



## **Development Officer Regular Giving & Legacies**

### **Job Description & Person Specification**

#### **Role Overview**

The Development Officer role focuses on securing support from a broad base of alumni and other supporters. This entails securing both one-off and regular donations and promoting Pembroke's programme of legacy giving. The post-holder reports to the Development Manager and works closely with that role to identify those alumni with the capacity and propensity to give more over time.

#### **Key Responsibilities**

The main duties to be carried out by the post-holder include:

##### Regular giving

- Lead on the development of the College's regular giving strategy and associated annual plans, and input into the wider Imagine Pembroke Campaign as required.
- Implement agreed regular giving plans to achieve annual income targets.
- Manage the College's annual telephone fundraising campaigns by working alongside telephone fundraising consultants as well as recruiting student callers.
- Develop innovative digital solicitations and Direct Mail appeals to acquire new donors and retain existing supporters.
- In common with all posts, ensure that fundraising activity is carried out in compliance with the College's policies and procedures, statutory obligations and best practice.
- Liaise with the Pembroke College North America Foundation (PCFNA) on their annual appeal to ensure a consistent approach.
- Develop a pool of mid-level (£1k-25k) fundraising prospects and engage them through face-to-face solicitations in support of the Imagine Pembroke Campaign.

##### Stewardship

- Work with the College Finance team to ensure regular giving donors are thanked for their support in a timely manner and in accordance with the College's thanking policy and framework, and that supporting information (e.g. Gift Aid declarations and fundraising opt-ins) are in place.
- Support the development of stewardship groups for regular donors and legacy pledgers. Liaise with the Senior Alumni Relations Officer to create and deliver events for members of these groups.
- Work with Finance, Fellows and Development colleagues to ensure any restricted gifts/appeal income is utilised in accordance with their purpose and to track and report on progress to donors in line with relevant gift agreements and pledges.

- Ensure donors receive appropriate recognition in all relevant College publications and other media and work in close collaboration with the Communications team to ensure donors receive relevant College and Campaign communications.

### Legacies

- Implement agreed legacy giving plans to build the pool of legacy pledgers, achieve annual income targets and long-term legacy income ambitions.
- Develop effective and appropriate legacy cultivation and stewardship plans and deliver high quality communications to this group of supporters.
- Manage a portfolio of legacy pledgers and prospects, maintaining close relationships with each pledger and prospect.
- Integrate legacy fundraising into the activities of the wider Development team.

### Internal collaboration

- Work collaboratively with the wider team and colleagues across Pembroke, supporting work outside your functional area where necessary.
- Build strong internal relationships with relevant stakeholders to ensure regular giving programmes are supported at the highest level.
- Work with Fellows, the Development Committee and colleagues to identify priority funding opportunities for annual appeals that match with donors' interests and their capacity to give, and work with colleagues within the College to develop appropriate cases for support that inspire alumni and other donors to give generously and regularly.
- To undertake such other duties as may be reasonably required by the Development Director, which may include travel and event attendance outside standard working hours.

## **Person Specification**

### Essential

- Educated to degree level.
- Experience in alumni relations, fundraising, customer relations, or a related field.
- Excellent communication and interpersonal skills.
- Understanding of Gift Aid and international tax-effective giving mechanisms.
- Good analytical, IT, and administrative skills.
- The ability to take the initiative and a track record of meeting targets.
- Strong organisational and project management skills.
- Ability to work within an interdependent team.
- Ability to deal with confidential matters and act with discretion.

### Desirable

- Experience of designing and implementing multi-channel fundraising appeals.
- Track record of successfully managing regular giving fundraising programmes.
- Understanding of Right to Work checks for Tier 4 student visas.
- Knowledge and experience of the Higher Education sector.
- Experience of using a CRM database, preferably DARS.
- Experience of working within a fundraising campaign.