



## Individual Giving and Legacy Manager Job Description

<b>Hours:</b>	35 hours full time, part time and flexible working considered
<b>Management:</b>	Workstream management to the Digital Marketing & Communications Officer two days per week
<b>Responsible to:</b>	Head of Public Fundraising
<b>Contract:</b>	12 months maternity cover
<b>Salary:</b>	c. £35,000

### Job Summary

As a key member of the Fundraising & Marketing Management Team, you will lead the development and management of our individual giving programmes and activities, including the charity's lottery, to maximise income and drive lifetime value.

You will be responsible for donor acquisition and retention, ensuring excellence in our donor care and including effective use of our supporter database, Raisers Edge, to increase supporter engagement.

You will develop and implement legacy and in memory marketing plans.

Supported by the Head of Public Fundraising, you will develop strategic and operational plans and budgets for your operational area, to ensure alignment with the overall Fundraising & Marketing strategy and that growth targets are achieved.

### Key Accountabilities

#### Individual Giving

- Recruit and develop committed givers using a mix of channels, building our database of supporters as a key way of securing unrestricted income.
- Review and develop supporter journeys to maximise retention and optimise lifetime value through strategic use of effective data.
- Ensure excellent donor and supporter care to drive loyalty and increase engagement using a planned and effective stewardship plan including encouraging lapsed donors to resume giving.
- Maximise the value of current donors, offering different opportunities to engage with the charity. This includes working with the Philanthropy & Partnerships and Community teams to review and develop cross-team supporter journeys opportunities.
- Review and develop direct marketing plans through effective use of database segmentation and develop high quality compelling direct fundraising tactics to drive income and engagement.
- Analyse each campaign and use findings to make recommendations for future appeals.



- Explore and test new methods for donor recruitment and increasing donations, including working with the Brand & Marketing team on the identification and development of hospital site marketing opportunities.
- Explore new income streams making recommendations for tests and pilots and implement as agreed with Head of Public Fundraising.

#### Legacy and In Memory

- Encourage legacy gifts via existing donors and supporters through legacy campaigns.
- Deliver positive stewardship to our legacy pledges including exploring the development of pledger and legacy events to support stakeholder management.
- Work with the Brand & Marketing team to plan, deliver and evaluate a range of legacy and in memory marketing campaigns.
- Work alongside the Hospital Partnerships Manager to build relationships with hospital staff to develop innovative ways of promoting legacy giving to patients (both past and current), their families, foundation trust members and governors and staff.
- Build relationships with solicitors, lay executors and other charity legacy officers to promote legacy giving.
- Act with sensitivity, patience and empathy with those who have been recently bereaved.
- To manage in memory giving and develop products to drive income.
- Research and recommend new ways of raising money through legacy and in memory fundraising and implement as agreed with Head of Public Fundraising.

#### Lottery

- Play a key role in managing the relationships with external stakeholders of our lottery programme and our lottery fundraisers.
- Review and develop supporter journeys to maximise retention and optimise lifetime value including uplifting donations.
- Work alongside Brand & Marketing team to develop and promote our weekly and super draw offering.
- Work alongside the Hospital Partnerships Manager to increase knowledge of and engagement with the lottery programme with staff in our partner NHS Trust.

#### Management

- To provide workstream leadership and management to the Digital Marketing & Communications Officer to ensure they are encouraged and motivated to perform at their best and achieve agreed targets.
- Work with the Data & Insight Manager to support the Supporter Care Officer in balancing supporter care priorities across the teams.
- To identify administration and research work office volunteers can help with and support them with the delivery.



### Strategy and Planning

- Work alongside the Data & Insight Manager to ensure decisions, plans and actions are based around data and insight and exploring new opportunities for working together.
- Contribute to the development and review of the Fundraising & Marketing strategy, business plans and supporting Individual Giving, In Memory, Legacy and Lottery plans.
- To be accountable for Individual Giving, In Memory, Legacy and Lottery plans and maximising long-term growth in these areas.
- Develop, implement and monitor annual operational plans, budgets and income forecasting, and ensure internal reporting is completed.
- Undertake ongoing evaluation of activity to ensure maximised return on investment.
- Keep up to date with relevant legislation and developments which affect the charity.
- To contribute to the overall work and reporting of the fundraising and marketing team through excellent teamwork and cross team working.

### **Person Specification**

#### **Essential**

#### **Knowledge and experience**

- Demonstrable experience of individual giving and direct marketing fundraising including donor acquisition methods and processes.
- A passion for and thorough understanding of donor care and stewardship and proven experience of driving supporter engagement.
- Demonstrable knowledge of legacy and in memory marketing and fundraising techniques and methods.
- Demonstrable experience of achieving and exceeding targets for individual giving and legacy fundraising.
- Experience and proficiency of working with a fundraising CRM package and data segmentation processes (ideally Raisers Edge).
- Excellent written and verbal communication skills.
- Experience of leading others to achieve targets.
- Sound experience of producing, analysing and interpreting statistical data to guide decisions and using donor segmentation to drive donor journeys.
- Experience of budget setting and monitoring, strategy development and action planning.
- Knowledge of Gift Aid and GDPR and the regulatory environment.

#### **Skills and personal qualities**

- Good analytical skills particularly with data.



- A team player with strong cross team working skills.
- Excellent organisational skills with high standards, attention to detail and high degree of accuracy.
- Enthusiastic, self-motivated and proactive individual able to organise and plan with conflicting demands and establishing clear priorities.
- Empathy with and understanding of the aims and objectives of Bristol & Weston Hospitals Charity.

**Desirable**

- Previous experience of managing a charity Lottery.
- Previous health sector experience.

The responsibilities of this post and reporting structure will be periodically reviewed.



## **General information**

Due to the dynamic nature of the sector in which we work, job descriptions are subject to review. Jobholders are expected to be flexible and may be required to undertake duties which are not described in those above. Reviews will be undertaken when necessary by line managers in consultation with post holders.

The charity's normal working hours are 37 hours a week, but it is necessary to be flexible due to specific deadlines or the nature of our fundraising activity. You may be expected to attend some events at weekends and in the evenings.

The staff work as a team and, as a small team, we expect all our staff to support each other and have the flexibility to get involved in activities as and when it is needed and appropriate.

## **Health and safety**

Under the provisions contained in the Health and Safety at Work Act 1974, it is the duty of every employee to:

- a) take reasonable care of themselves and for others at work
- b) to co-operate with the Charity as far as is necessary to enable them to carry out their legal duty
- c) not to intentionally or recklessly interfere with anything provided including personal protective equipment for Health and Safety or welfare at work.

## **Additional Work**

You are required to disclose any additional work you undertake or are planning to undertake for another employer. The Charity will permit you to undertake this additional work providing the Director of Fundraising & Marketing and Chief Executive are satisfied that this does not conflict with the interests of the organisation, performance of your normal duties or with the requirements of the Working Time Regulations.