

JOB DESCRIPTION

JOB TITLE: PHILANTHROPY MANAGER

PAY BAND: Band 7 (£48,270 - £54,931 with HCAS)

DEPARTMENT: Frimley Health Charity

RESPONSIBLE TO: Head of Fundraising

DATE: October 2024

DIMENSIONS OF JOB:

As a senior member of the fundraising team, you will take a strategic approach to leading the development and management of our Major Donor, Trust and Foundation, Legacy & Grateful Giving programmes to maximise income and meet annual targets. You will be accustomed to dealing with senior level figures and managing the highest-level relationships between the Trust, the Charity, and major donors in the community.

PURPOSE OF JOB:

You will be a dynamic and self-motivated fundraiser who will lead on the implementation of a grateful giving programme across our trust. Reporting to the Head of Fundraising, the Philanthropy Manager will lead on proactively approaching a range of major donor and trusts funders to achieve a long-term strategy for growth in income. This role will be responsible for personally securing major gifts from High-Net-Worth Individuals.

As a senior member of the fundraising team, you will take a strategic approach to leading the development and management of our Major Donor, Trusts and Legacy programmes to maximise income and meet annual targets. You will be accustomed to dealing with senior level figures in the corporate world and in managing the highest-level relationships between the Trust, the Charity, Trusts, legators and major donors.

KEY TASKS & RESPONSIBILITIES:

1. Strategy and Planning

- 1.1. To develop and implement a multi-year strategy and activity plan for philanthropy fundraising with the Head of Fundraising to agreed targets and plans to significantly grow income.
- 1.2. Working with the Head of Fundraising, specifically establish a clear pipeline monitoring system to identify and track major prospects and undertake an audit of the main supporter database to identify and research major donor prospects and insights.
- 1.3. Develop, manage, and maintain accurate systems to record, report and analyse all activities in relation to philanthropy fundraising.
- 1.4. Although guided by organisational fundraising strategy and policies in most situations the post holder is responsible for the development of policies and procedures for philanthropy fundraising which will have an impact across the whole Trust and in the community around.

- 1.5. Using research tools create major donor profiles to inform case for support and stewardship plans.
- 1.6. Identify and develop necessary systems and processes to support the growth of philanthropy income across the charity.
- 1.7. Develop, implement, and monitor annual action plans, budgets, and income forecasting, ensuring internal reporting is completed.
- 1.8. Keep up to date with relevant legislation and developments which affect the charity.

2. Major Donor, Legacy and Trust Fundraising (Philanthropy)

- 2.1. Design, develop and implement new corporate supporters, major donors and revenue generating events, prioritising those opportunities to achieve the best ROI.
- 2.2. Build an effective prospect pipeline, including regional partners, through referrals, networking, events, and other mechanisms, delivering presentations and pitches to secure support.
- 2.3. Initiate and manage a programme of events including developing strategies to cultivate diverse business leaders and HNWI's.
- 2.4. Manage project visits and other major donor cultivation events as appropriate.
- 2.5. Develop strategic, mutually beneficial partnerships with corporates across the region and use the charity's activities to drive more sponsorship.
- 2.6. Develop and deliver comprehensive and tailored solicitation and stewardship plans for all prospects, donors, and supporters. Ensure each supporter for whom you have responsibility receives appropriate, consistent, and timely stewardship, and are given the opportunity to support the Frimley Health Charity through as many appropriate means as possible.
- 2.7. Work with influential individuals to develop an effective pool of ambassadors and advocates to act on our behalf including setting up and managing volunteer committees.
- 2.8. Work with trustees, NHS colleagues, current donors, and supporters to map contacts, research, make links and identify opportunities to extend and broaden portfolio.
- 2.9. Work with the fundraising team to identify funders and prospects which overlap into other areas of giving to share leads and contacts, identifying links and opportunities to maximise charity income and influence.
- 2.10. Regularly analyse the CRM database to ensure all opportunities to engage donors and prospects are utilised.
- 2.11. With the Head of Fundraising, take a lead on working with NHS colleagues, from front line staff to senior consultants, to identify and develop tailored cases for support. Ensure information is available in formats able to be utilised by all fundraisers.
- 2.12. Develop relationships with NHS colleagues to ensure an effective two-way flow of information, encouraging NHS staff to highlight potential cases for support.
- 2.13. Use compelling methods of communication to build positive relationships and inspire support, securing multi-year commitments wherever possible. Maximise use of senior charity staff, advocates, and NHS colleagues to make direct fundraising asks.
- 2.14. Manage a portfolio of existing partners, providing motivation, and stewarding supporters to maximise the funds raised and achievement against agreed partnership outcomes.
- 2.15. Research and submit high quality applications and presentations to prospective organisations.
- 2.16. Monitor project applications and ensure regular reporting is sent to all donors as required.

3. Income Generation and Donor Stewardship

- 3.1. Using the database and our network of staff, trustees, and supporters, identify, research, approach and cultivate new and existing prospects.

- 3.2. Accountable for an annual fundraising target of £1.5m (subject to increase year on year).
- 3.3. Provide briefings for Frimley Health Charity representatives involved in meetings or events with major donors. Work with colleagues, trustees, and supporters to facilitate secure personal introductions and meetings with prospects.
- 3.4. Working with the Head of Fundraising, identify suitable projects within the charity's plan to build cases for support and wish lists for new and existing donors. Create tailored presentation materials to evidence the need and personal, timely reports to evidence the impact.
- 3.5. Develop and implement donor care and stewardship programmes. This will include, but not be limited to, individual donor care plans, written communications and reports, face to face meetings and a programme of events and visits.
- 3.6. Identify and manage the coordination of acknowledgment and recognition opportunities.
- 3.7. Together with the Head of Fundraising enter negotiations and secure income from Major Donors, ensuring all parties are involved internally and externally and all are in full agreement with commitments on both sides.
- 3.8. Providing donors and supporters with personalised and tailored proposals, financial and narrative reports, and updates. Working with hospital colleagues to develop effective impact reports and updates in formats that can be utilised by all fundraisers.
- 3.9. Work closely with NHS colleagues to monitor project delivery and alert funders to any changes to funded work.
- 3.10. Keep meticulous records on the database of all actions and communications.
- 3.11. Responsible for using the query function on the CRM database to regularly create statistical reports on major donor giving and updates to the prospect list of major donors in the region.

4. Stakeholder Management

- 4.1. Effective direct line management of the Philanthropy Officer.
- 4.2. Together with the Head of Fundraising and Charity Director, develop and manage relationships with new and existing major donors, trustees, and influential stakeholders to ensure successful solicitation of major gifts, repeat gifts and increased value gifts.
- 4.3. To manage a portfolio of major donor prospects with a particular emphasis on those capable of giving more than £25K.
- 4.4. Work closely with the Head of Fundraising and Charity Director, Board, staff, and existing supporters to map and build on their networks and mobilise introductions / asks.
- 4.5. Work across fundraising teams to identify relevant prospects, co-ordinate approaches and steward donors appropriately.
- 4.6. Establish and maintain a thorough data management system to track and record communications with prospects and donors.
- 4.7. Build and develop cross-organisational relationships to facilitate fundraising and strengthen the charity's understanding of the Major Donor format and function.
- 4.8. Extensive contact with patients and their families to work with them to find the funding opportunities they would like to become involved with.
- 4.9. Dealing with grieving families and the traumatic and highly emotional and distressing circumstances that they are going through.
- 4.10. To develop strong relationships with all stakeholders that can influence the lives of patients across Frimley Health NHS Foundation Trust.
- 4.11. To identify opportunities to promote and further Frimley Health Charity's strategic goals through external speaking engagements and identify the most appropriate spokespeople to ensure appropriate deployment of expertise.
- 4.12. To represent the charity on national forums and partnerships as appropriate.
- 4.13. To contribute to the overall work and reporting of the fundraising and communications team through excellent teamwork and cross team working.

5. Reporting, Finance and Budgets

- 5.1. Working with the Head of Fundraising, set annual Grants, Major Donor and Legacy income and expenditure targets and set out appropriate activities to ensure these are met or exceeded.
- 5.2. Prepare phased budgets and forecasts in line with activity plans and progress to ensure the value and timing of planned restricted and unrestricted income to the charity is accurate.
- 5.3. Prepare monthly fundraising reports for the Head of Fundraising and Director.
- 5.4. Responsible for an income stream developing to annual fundraising target of £1.5m (subject to increase year on year).
- 5.5. Compiling and drafting major donor research and profiles, writing cases for support and fundraising proposals
- 5.6. Develop, implement, and monitor annual action plans, budgets and income forecasting, ensuring internal reporting is completed.
- 5.7. Responsible for developing and managing the budget for grants, major donor, and legacy fundraising which will impact on fundraising across the whole Trust.
- 5.8. Responsible for maintaining the CRM database with all information about philanthropy fundraising.

6. Other

- 6.1. Represent Frimley Health Charity at weekend and evening events if required.
- 6.2. Be aware of the changing external environment to pick up on opportunities and keep abreast of current trends, circumstances or topical issues that will enhance the event or the charity.
- 6.3. Ensure the Philanthropy function adheres to Frimley Health Charity and sector Data Protection best practice and requirements.
- 6.4. Maintain and further develop data capture requirements for the contacts database and progress database changes with the Individual Giving Manager.
- 6.5. Undertake any other responsibilities or duties requested by the Head of Fundraising or Director.
- 6.6. Responsible for high level and regular research to compile reports and profiles on major donor prospects in the region.
- 6.7. Responsible for researching corporates and high net worth individuals and identifying opportunities with an understanding of sector trends.
- 6.8. Contribute to the strategic direction of the fundraising team.
- 6.9. Maintain and develop positive relationships with internal and external stakeholders.
- 6.10. Any other non-recurring duties as required.

Standard Clauses

- The post holder will work within all policies, procedures and budgets set by Frimley Health Charity.
- The post holder will always act in the best interest of Frimley Health Charity.
- The post holder will form effective working relationships with all staff members, volunteers, and outside organisations as appropriate.
- The post holder must accept responsibility for ensuring that the policies and procedures relating to Health & Safety in the workplace are always adhered to.
- The post holder must respect the confidentiality of data stored electronically and by other means in line with the Data Protection Act.
- The post holder will not disclose to an unauthorised person any confidential information acquired through official duties unless they have received official permission to do so.

General

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 37.5 hours a week, but it is necessary to be flexible due to specific deadlines or the nature of our fundraising activity. You will be expected to attend some events at weekends and in the evenings.

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

This job description should be read in conjunction with the supervisory JD Addendum, available at: <https://www.fhft.nhs.uk/media/2753/jd-addendum-supervisory.pdf>

PERSON SPECIFICATION

JOB TITLE: Philanthropy Manager


PAY BAND: Band 7

DEPARTMENT: Frimley Health Charity

CRITERIA	Essential	Desirable
Qualifications	<ul style="list-style-type: none"> • Educated to a degree level. • Possess a relevant qualification or appropriate experience in a directly related post. 	<ul style="list-style-type: none"> • Professional fundraising qualification. • Membership of Chartered Institute of Fundraising.
Professional/ Functional Experience	<ul style="list-style-type: none"> • Excellent interpersonal and negotiating skills, including the ability to deal with people at all levels, both internally and externally • Self-motivated and able to work autonomously. • Keen to put patient care at the heart of work to improve outcomes and service delivery. • Confident and positive • Resilient and resourceful • Motivated to deliver the highest possible standards and quality outcomes. • Willing to “be the best you can be”, continually looking for ways to improve and develop to reach full potential. • Able to work effectively in conjunction with others (patients, colleagues, families) to contribute to the delivery of high-quality healthcare. • Build positive working relationships, respecting and valuing the contributions made by others and acting in a considerate, helpful, and inclusive manner always. • Highly credible across a range of audiences, including the scientific and medical communities. • Manages workloads in context of competing demands and changing priorities. • Communicate confidently and precisely when speaking and writing. Change your style of communication to match the needs of those present. Listen carefully and gets to the issues quickly. • Excellent relationship building skills. • Ability to work effectively as part of a team. 	<ul style="list-style-type: none"> • Confident to encourage others to develop themselves and the service through improvement, innovation, and continuous development. • Actively able to collaborate with other departments, providing support to others and contributing to an open culture and productive working environment. • Demonstrates an ability to understand and apply financial information to operate and manage resources efficiently and effectively.

	<ul style="list-style-type: none"> • Able to communicate with families going through bereavement and help them find projects that will help them as they grieve. • Proven track record of personally securing philanthropic gifts and delivering income growth from developing relationships with major donors and/or trusts. • Significant experience in philanthropy fundraising or a similar role. • Demonstrable experience of achieving income against agreed targets • A passion for supporter stewardship and proven experience of maximising philanthropy relationships. • Experience of researching high net worth individuals and identifying opportunities with an understanding of sector trends. • Experience of supporting senior volunteers, staff, and trustees to maximise donor relationships. • Experience using databases to identify prospective donors. • Experience using research to build donor profiles. • Demonstrable experience of recruiting new donors • Experience of developing and delivering exceptional donor stewardship programmes • Ability to develop, manage, and maintain accurate systems to record, report and analyse all activities in relation to philanthropy fundraising. 	
<p>Skills & Knowledge</p>	<ul style="list-style-type: none"> • A good understanding of the Philanthropy fundraising market and trends • Highly developed specialist knowledge in philanthropy fundraising or a similar role. • Highly developed specialist knowledge of major donor fundraising across the range of work procedures and practices, underpinned by theoretical knowledge and relevant practical experience. • Ability to apply a broad range of communication skills to influence, motivate and persuade a wide range of people to donate. • Excellent networking, interpersonal skills, and confidence in promoting the work of the Frimley Health Charity to funders, both by phone and in person. • Creative and lateral thinker with an 	<ul style="list-style-type: none"> • A good understanding of brand management, marketing, and PR • Familiar with Institute of Fundraising codes of practice • Understanding of the health and/or medical research landscape • Experience of using Beacon or another CRM database

	<p>innovative and strategic approach to attracting new business. Able to make judgements on complex funding opportunities which require careful analysis, interpretation, and comparison of a range of options.</p> <ul style="list-style-type: none"> • Excellent written and verbal communication skills sufficient to compile powerful cases for support and fundraising pitches in a clear, inspiring, and confident way. • Providing and receiving highly complex information about projects that require support and how higher rate taxpayers can give in the most tax efficient way, where persuasive, motivational, negotiating, training, empathic or re-assurance skills are required. • Excellent numeracy, literacy, and IT skills, including the use of databases, word processing, and excel spreadsheets. • Articulate, persuasive, and credible with all audiences, including those at the highest level both within the organisation and outside of it, with great networking skills. • Excellent organisation, prioritisation, and time management skills with the ability to deliver to a deadline under pressure within a context of competing demands. • IT literate with ability to use Microsoft office. • Understanding of Relevant Data Protection, Gift Aid and VAT legislation • A thorough understanding of tax efficiencies relating to significant donations. 	
Special Requirements	<ul style="list-style-type: none"> • Able to work irregular and/or extended hours, including weekends. • Ability to undertake UK travel when required. • Ability to represent the charity on national forums and partnerships as appropriate. • Light and occasional physical effort. 	

Values & Behaviours	<p>We will expect your values and behaviours to mirror those of the Trust, available at: https://www.fhft.nhs.uk/about-us/our-values/</p> <div style="text-align: center;">  </div>
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