

Senior Philanthropy Officer (Major Donors)

Recruitment Pack



Second grade students Faith and Violet at a School for Children with Visual Impairments in Kadoma, Zimbabwe. One is reading braille from a book on the school desk in front of her. ©CBM/Hayduk

CBM UK

www.cbmun.org.uk 0800 567 7000

Charity Registration No 1058162 (England & Wales) SCO41101 (Scotland)

Working with a supportive, flexible employer

Thank you for your interest in joining the CBMUK team.

At CBMUK, you would be joining a very supportive and collaborative community and working with a team who are incredibly friendly and passionate about their work. The wellbeing of our team is central to how we work. We encourage a healthy work-life balance, offer flexitime and up to 50% working from home. Our team benefit from excellent personal development opportunities and we can offer the chance to undertake fully paid training or study.

CBM UK's main office is located in Cambridge. We have a wonderful and accessible modern office building which is located nearby to Stourbridge Common and the River Cam. There is also a small office in Edinburgh where three members of the Programme Development Department are currently based.

Respect and compassion is at the heart of all that we do, and this reflects in our culture. We are an organisation based on Christian values welcoming staff of all faiths and none. It's the basis of why we do what we do, striving to build a just and equitable world in which all people are included, loved, valued, and respected. We do not proselytise, and we work with partners of all faiths and none according to the greatest need.

We are part of the UK Government Disability Confident Scheme as a Disability Confident Employer. We are working towards moving to the highest Disability Confident Scheme level of Disability Confident Leader.

Disability Confident organisations play a leading role in changing attitudes for the better. They're changing behaviour and cultures in their own businesses, networks and communities, and reaping the benefits of inclusive recruitment practices.

Who we are

Too many people face poverty and isolation, denied the chance to go to school or earn and living, just because they have a disability. CBM works in the world's poorest places to prevent blindness, improve health and transform the lives of people with disabilities.

For more than 110 years, since our founder Ernst Christoffel started working with children with disabilities in Turkey and Iran, we've been reaching out to those whom others leave behind.

Driven by Christian values, we work with disabled people to break down barriers by delivering practical support, improving policy and practice and inspiring the people of the UK to act.

With 45 UK staff, we're part of a Global Federation working in 29 countries. This is a truly exciting time to join us as we implement our ambitious new 'Breaking Barriers' UK strategy, fighting to end the cycle of poverty and disability.

Our Vision & Values

Our vision is an inclusive world in which all people with disabilities enjoy their human rights and achieve their full potential.

We Champion Inclusion

We challenge discrimination and embrace diversity. We work with people of all faiths and none and we strive to build a just and equitable world in which all people are included, loved, valued and respected.

We Strive for Justice

We challenge injustice and equip others to exercise their rights. We serve with compassion those in greatest need, regardless of race, gender, age or religious belief.

We Pursue Excellence

We creatively innovate and pursue continual improvement so that we can maximise our impact and bring about tangible change in the lives of those whom others leave behind.

We Embrace Partnership

We can achieve more when we work with others. We learn together with our partners, communicate respectfully and honestly, and we value everyone's unique contribution.

We Live with Integrity

We live responsibly and with honesty.

For more information on our values and culture, please visit our website: [Our Culture](#)
- [CBM \(cbmuk.org.uk\)](http://cbmuk.org.uk)

About the role

Role:	Senior Philanthropy Officer (Major Donors)
Place of work:	Munro House, Mercers Row, Cambridge, CB5 8HY (with up to 50% working from home optional). Occasional travel throughout the UK, including out of normal office working hours, for which a time-off-in-lieu policy applies.
Increment:	£33,690 to £35,730 prorated for part time hours and dependent on experience.
Contract type:	Part-time:22.5 hours per week (working pattern to be agreed with successful candidate).
Reports to:	Head of Philanthropy

Purpose

This is an exciting time at CBM UK, as we continue to grow and develop our philanthropic fundraising. To help us achieve our ambitious long-term goals this role requires an experienced and passionate individual to be part of our Philanthropy Team.

This vital role works alongside the Head of Philanthropy as we look to build our philanthropic partnerships over the next five years and beyond, with a particular focus on our High-Net-Worth Individuals (Major Donors). As well as building upon current relationships, you will identify, research and cultivate relationships with new and lapsed major donors to help increase income from this important income stream.

You will be part of a dynamic and highly skilled Fundraising and Communications team, dedicated to inspiring people in the UK to help transform lives in some of the world's poorest places.

Responsibilities and areas of work

This important role will seek to develop our Major Donor income stream, seeking to grow both numbers of donors and income raised. At CBM, a Major Donor is considered to be one who has the capacity to give £5,000+ per year and who relishes the opportunity to have one-to-one, personalised interactions with CBM.

This role will seek to identify new high-level donors, as well as help to develop existing relationships with our generous supporters.

Working closely with the Head of Philanthropy, other team members and (occasionally) external consultants, and in collaboration with our colleagues in the Programmes Team, this role focusses on building and consolidating our major donor portfolio, so increasing our donor base and thus our in-year and pledged income.

Main Goal:

To successfully steward a portfolio of major donors through tailored approaches, so securing repeat and multi-year gifts to achieve agreed income targets and KPIs.

This will be achieved through:

1. New business acquisition:

- a) Interrogating our current supporter base to build a prospect list, using our database (Salesforce) and external databases, to assess the potential to upgrade active, lapsed and prospective major donors.
- b) Researching, identifying and securing major donor prospects, through the identification of high-net-worth individuals who may have an interest in CBM's work, and through proactive and effective networking, including working with our Trustees, Patrons and Ambassadors.
- c) Identifying next steps and determining tactics for engagement, including 1:1 working, giving group presentations and delivering pitches at various levels.

2. Stewardship and cultivation of current and active donors:

- a) Developing and implementing tailored cultivation and stewardship plans, so that individuals are engaged in a bespoke manner, ensuring that they feel a part of CBM and that their generosity is recognised, through regular reporting, interactions, updates and tailored approaches.
- b) Developing donor-centric applications, proposals and initial approaches (by post, email and phone) that are driven by insight on donors' individual needs and preferences and are tailored to their interests and requirements, following up as required.
- c) Reporting to donors in both formal and informal ways, as appropriate, to ensure they are kept up to date with CBM, the impact of their grant and project developments.
- d) Hosting and facilitating face-to-face and online meetings with high-level donors, including organising dates, venues and agendas/ talking points, and creating Meeting Briefs for all attendees to ensure positive outcomes as far as possible.
- e) Promoting the importance of legacies, and legacy income, where appropriate, and to steward those who have pledged.

3. Proposal and Report Writing

- a) Crafting compelling proposals and reports that meet the bespoke needs of donors whilst meeting the needs of CBM and our Programme delivery colleagues, within agreed deadlines.
- b) Working with members of the Programmes Team to ensure the accuracy of proposals / reports, and with members of the Fundraising & Communications Team to ensure consistency of messaging.
- c) Working with the Philanthropy Team to develop new projects/ themes/ appeals for potential projects.

4. Other

- a) Ensuring all information, donor activity is recorded and kept up-to-date on our database to fully-inform any approaches/meetings.
- b) Closely monitoring income and expenditure, reporting to the Head of Philanthropy where necessary, and contributing to the creation of yearly fundraising budgets and plans.
- c) Providing proof-reading and copy-editing support to colleagues.
- d) Helping to develop a culture of enthusiasm and success, reflecting the ambitions of CBM, and promoting positive working and innovation.
- e) Ensuring that the values of CBM UK are understood by external partners and always reflected in communications.
- f) Carrying out any additional duties as required by the Head of Philanthropy and Director of Fundraising & Communications.

Person specification

All of the following requirements are **essential**, unless identified as **desirable**, and will be assessed from a combination of information provided from the application and the interview process.

Skills/Competencies:

- Successful track record of securing high-value philanthropic gifts.
- Some experience of identifying and cultivating cold prospects, through networking, presentations or making pitches.
- Experience of successful stewardship of major donor contacts to yield repeat or increased gifts.
- Understanding and appreciation of different supporter motivations, triggers for giving, values and beliefs. Some basic understanding of legal, financial and ethical considerations related to fundraising from Major Donors.
- Successful track record of securing high-value philanthropic gifts at the **5-figure level or more (desirable)**.
- Experience of effectively using a CRM system for fundraising **(desirable)**.
- Ability to understand and contribute to budgetary planning **(desirable)**.

Personal qualities:

- Excellent organisational skills, with the ability to prioritise multiple tasks to ensure deadlines are met and to manage complex projects. Able to plan, work strategically and under pressure.
- Excellent communication and English language skills. Able to communicate effectively, clearly and diplomatically both verbally and in writing. Able to understand complex reports and present them in a supporter-facing context, both verbally and in writing. Good negotiating skills.
- Robust, 'can-do' attitude that thrives on challenges. Target driven.
- Adept in MS Office, including good working knowledge of Word and Excel.
- Fully committed to the core values and mission of CBM UK.

Qualifications, training, and education

- Education to degree level or equivalent level of relevant experience **(desirable)**.
- Knowledge of international development **(desirable)**.
- Knowledge of customer relations and/or fundraising **(desirable)**.

Employee Benefits

- Agile working for all staff members which includes options for flexible working hours and up to 50% working from home for most roles.
- Wonderful modern offices, which are fully accessible.
- All full-time employees are entitled to 25 days' holiday per year in addition to UK public holidays.
- Option to buy extra annual leave.
- CBM places an emphasis on professional development and training for its employees in order to enable them to fulfil their roles. We support employees in their desire to further their qualifications and careers, including offering opportunities to undertake fully paid study and training.
- Competitive salaries within the sector. We regularly review salaries to attract, develop, motivate and retain the appropriate calibre of employees.
- We offer a pension plan with employer contribution of up to 5%.
- Group Life Insurance for all employees, which is equivalent to 2 x your annual salary.
- Yu-Life (employee wellbeing app).
- Our Wellbeing Working Group actively supports mental health and wellbeing in the office. We also offer a free Lifestyle Counselling Helpline & Online Support Service.
- Bike to work scheme.

Diversity and Safeguarding

Everyone has the right to be treated with consideration and respect. CBM UK is committed to achieving a truly inclusive environment for all, by developing better working relationships that release the full potential, creativity and productivity of each individual.

CBM UK aims to ensure that all staff, volunteers, supporters, partners, contractors, and the general public are treated fairly. This will be regardless of sex, sexual orientation, gender re-assignment, marital or civil partnership status, race, including colour, nationality, ethnicity, or national origin, disability, medical status, age, religion or belief, political opinion, social or economic status, or ex-offender status.

All roles within CBM UK are required to actively respect, support and promote the safeguarding of all children and adults who come in contact with our organisation, including our beneficiaries, partners, staff and volunteers, ensuring policies and procedures are followed and observed at all times.

CBM UK is an equal opportunities organisation, a disability-confident employer, part of the Age Friendly Employer Pledge and committed to achieving the highest standards of diversity, fairness and equality. Should you require any additional support or reasonable adjustments please [email us](#).

Employment Checks

We are unable to provide sponsorship for this post. All offers of employment are made subject to proof of eligibility to work in the UK, proof of residency and satisfactory employment screening, and three references satisfactory to CBM UK and a DBS Check.

Use of Curriculum Vitae

Our policy is to recruit and employ our employees on the basis of their suitability for the work to be done. An application form allows us to compare individuals based on like for like information and as such your CV should be accompanied by a completed application.

Shortlisting and Interviews

All applications are subject to our shortlisting process. If you are shortlisted we will contact you and invite you to attend an interview. You will also be advised at this point if there will be any skills tasks to complete as part of the recruitment process.

How to apply

More information about CBM can be found by visiting our [website](#).

We are also happy to have an informal chat, as we'd love to tell you more about this exciting role, or to answer any questions you may have. Please [email](#) our Recruitment Team or call us on 01223 484700.

Application forms can be [downloaded from our website](#).

Please email your completed form and Curriculum Vitae to recruitment@cbmuk.org.uk

Closing date for the receipt of applications is 9am Monday 20th May 2024.

We look forward to receiving your application.