Supporter Experience Officer
Job Description

Job Title: Supporter Experience Officer

Accountable to: Head of Supporter Services

Job purpose:

To provide an excellent donor experience for our supporters by ensuring our data is in brilliant shape

To improve supporter retention and ensure long-term donor engagement for our individual supporters (including one-off and regular givers, our Trelottery players and event attendees) by providing high quality communications

To contribute to the development of supporter journeys through creating supporter engagement processes and introducing automation to these processes

Key responsibilities:

Supporter data	▪ Taking responsibility for segmenting and managing our digital mailings – including event marketing, monthly e-news and fundraising campaign materials. This would involve working with the Fundraising team to maintain an annual digital mailing schedule ▪ Designing and running regular data check on Raiser's Edge CRM (Raiser's Edge training will be provided) to make sure our supporters are hearing from us in the way they want to. This will include helping us to adapt to the new soft-opt-in regulation for charities ▪ Develop and maintain campaign dashboards to monitor supporter engagement metrics and data quality
Supporter retention	▪ Take responsibility for recording, thanking and staying in touch with our brilliant individual giving community who support us with regular gifts, one of donations, by playing the Trelottery and who attend events. Including creating personalised thank-you communications such as handwritten notes, impact videos, and donor recognition opportunities. ▪ Create and manage a feedback loop with supporters to gather insights and improve retention strategies. ▪ Help to develop tailored stewardship plans for individual givers, regular donors, and event attendees to ensure ongoing engagement. ▪ Monitor giving patterns and proactively engage with lapsed donors.
Supporter journeys	▪ Set up user journeys and automate processes on our CRM, alongside developing innovative way to help these supporter feels valued such as personal phone calls, impact videos and other creative methods ▪ Create onboarding journeys for new supporters to introduce them to Treloar's mission and impact. ▪ Create segmented supporter journeys for different donor types (e.g., regular givers, event attendees) with personalised touchpoints. ▪ Research and develop the automations of milestone acknowledgments (e.g., donor anniversaries, cumulative giving thresholds) to celebrate supporter loyalty. ▪ Collaborate with the Events team to integrate post-event follow-up into CRM database workflows, ensuring attendees are thanked and invited to future opportunities.
General responsibilities	▪ To ensure that all donations are acknowledged in a timely and appropriate manner (target of three working days from receipt of donation), in conjunction with the fundraising data team. ▪ To ensure that the database is kept up-to-date and reflects accurate donor profiles for all supporters, including details of links to other donors and/or Treloar's staff and officers. ▪ Keep abreast of relevant charity laws and legislation relating to legacies and individual giving. ▪ Ensure that activities are undertaken within agreed expenditure limits.

	▪ Ensure that all activities are undertaken in accordance with Treloar's Equal Opportunities Policy. ▪ Work with all other Fundraising Team members and contribute to the overall strategic development of the department. ▪ Attend and contribute to departmental meetings and other relevant gatherings and committees. ▪ From time to time to undertake duties outside of the main area of responsibility in support of peak workloads, and actively support our exciting event schedule by attending events (some evening and weekends required) ▪ To support Treloar's in safeguarding and protecting the welfare of all students. ▪ To comply with policies and procedures relating to safeguarding, health and safety, equality and diversity, confidentiality and data protection, reporting concerns to an appropriate person. ▪ To maintain and develop your own professional knowledge and awareness. ▪ To undertake any other such duties or general tasks and hours of work as may reasonably be required and any other responsibilities, which may from time to time, be delegated by your manager. ▪ A job description is not a rigid or inflexible document but acts to provide guidelines to the duties expected while in the post. ▪ This job description will be reviewed and amended in the light of changing professional demands.

PERSON SPECIFICATION – Supporter Experience Officer

ESSENTIAL	DESIRABLE
Education • Good level of education including Maths and English GCSE A-C or equivalent • Willingness to take part in additional training	
Skills and Knowledge • Knowledge of individual giving fundraising • Informed understanding of the key elements of successful supporter development • Ability to plan and prioritise a varied and busy workload • Proficient in using Microsoft Office Suite • Ability to work with colleagues in many different disciplines • Clear, concise and persuasive writing style • Good telephone manner • Good people management skills	• Ability to understand and help to implement a strategic plan for fundraising • Knowledge of social media platforms and ways to use them for fundraising purposes. • Broad understanding of charity legislation as it applies to individuals and fundraising • Strategic thinker able to devise and implement new approaches
Experience • Experience of working within a charity setting. • Experience of using a CRM or other database • Experience of communicating to different audiences using a variety of methods (email, in-person, post, etc.) • Experience of building loyalty and managing relationships at all levels	• Experience of dealing with the public to raise money and promote activities
Personal Qualities	

• A passion for and understanding of the power of data • Mature approach • Good attention to detail • Confident and dependable manner • Readiness to work unsociable hours as the job demands • A commitment to promoting and safeguarding the welfare of students • An understanding of and commitment to Treloar's equal opportunities policy • Goal orientated and highly motivated • Diplomatic and sensitive • Strong belief in the work of Treloar's	
TRELOAR TRUST IS COMMITTED TO SAFEGUARDING CHILDREN, YOUNG PEOPLE AND VULNERABLE ADULTS All successful candidates will be subject to a DBS Check along with other relevant employment checks	

BOTH THE JOB DESCRIPTION AND THE PERSON SPECIFICATION ARE SUBJECT TO THE TRUST'S EQUAL OPPORTUNITIES POLICY.

We are very keen to find the right person for this role, and are open to flexible working opportunities, including hybrid, and the potential of term time working. We request a minimum of 1 day in the office.