



Lancashire,
Manchester &
N Merseyside

JOB DESCRIPTION

1. IDENTIFICATION OF POST

POST TITLE	Individual Giving Officer (legacy and major gifts)
FUNCTION	To improve the Trusts donor journey, generating an increase in support for our cause with a focus on legacy, in memoriam and major giving.
RESPONSIBLE TO	Director of Marketing
RESPONSIBLE FOR	Volunteers

2. CULTURE

The Lancashire Wildlife Trust is committed to protecting wildlife, restoring biodiversity and connecting people with the natural world in Lancashire, Manchester and North Merseyside. This commitment brings tenacity in dealing with challenges and huge personal satisfaction from successful projects.

We encourage a creative atmosphere where new ideas can flourish. People who thrive in our organisation enjoy an atmosphere where they take on a high level of personal responsibility for achieving outstanding results whilst building strong relationships both internally and externally.

3. PURPOSE OF POST

To build excellent, long-term relationships with all our supporters and potential supporters, especially our members. The post holder will lead the development and delivery of our supporter development journey, with a particular focus on increasing legacy and in memoriam giving. The post holder will develop and deliver a major giving program and lead on the delivery of fundraising appeals. This is a target driven role to provide crucial unrestricted funding for the charity.

4. MAIN RESPONSIBILITIES

To develop and implement an effective major giving programme which delivers exceptional donor care standards and supports the core mission of the Trust, whilst meeting annual targets.

- a. Build and sustain a clear and compelling case for support.
- b. Pro-actively identify and research donors, key supporters and potential legacy pledgers. Develop and deliver a strategy to maximise the potential of these.
- c. Work closely with the Director of Marketing, Senior Management Team and Trustees to ensure that all relationships are progressed by the most appropriate contact whilst maintaining overall responsibility for our major supporter portfolio.
- d. Build, develop and steward relationships with existing and potential supporters and legacy pledgers through a proactive programme of events and activities.

- e. Ensure that all supporters are thanked and feel valued.

To lead on the promotion of, and supporter care for legacy and in memoriam giving

- a. Develop and deliver awareness promotion to existing supporters by working closely with the Marketing Manager.
- b. Organise supporter 'thank you' events, following a segmentation process and designing events accordingly across the Trusts reserves.
- c. Deliver supporter direct marketing lead-generation campaigns (for a legacy pledge).
- d. Sustain and develop relationships with local solicitors who will recommend the Trust for gifts in wills.
- e. Develop legacy content for social media, the Trust website, supporter newsletters and the Trusts membership magazine.
- f. Develop and promote fundraising dedication opportunities in memory or celebration, both via existing communications channels and on Trust sites (e.g. giving trees).

Develop the Trusts individual giving programme

- a. Delivery activities in line with the Trusts individual giving strategy.
- b. Co-ordinate the Trusts annual fundraising appeals.
- c. Identify and promote opportunities for individual fundraising.
- d. Ensure the Trust is present on key third party fundraising platforms with a compelling case for support.
- e. Create a donor journey to convert one time supporters into long term members.
- f. Explore new ways to take donations and implement, utilising latest industry trends and technology.
- g. Work with the Membership Recruitment Officer to utilise the warm leads database from an individual giving perspective.

Targets and Reporting:

- a. Work towards achieving fundraising targets set for the team and as an individual.
- b. Contribute to setting targets for the annual action plan and work with the Director of Marketing to complete annual budgets and reforecasting.
- c. Pulling and analyzing information from the database, identifying trends and using these to inform our plans and compiling monthly reports against agreed KPIs.

Administration:

- a. Ensure the donor contact database 'ThankQ' is accurately updated with information about donors and members in partnership with colleagues. The post holder will develop a very detailed knowledge of the database.
- b. To offer administrative support on our retention projects such as telephone campaigns, warm lead campaigns and events.
- c. Lead on the administration of legacy, in memoriam and in celebration giving, with meticulous attention to detail.
- d. Provide monthly reports on income.
- e. Utilise the CRM system to identify new potential high value and major donors and report on

- these.
- f. Offer cover for the Membership colleagues' role during annual leave and sickness, or at busy times.

Building Excellence:

- a. Ensure that fundraising guidelines enforced by The Institute of Fundraising and Fundraising Regulator are followed.
- b. To undertake appropriate training activity for skills and personal development in liaison with the Director of Marketing including attending Wildlife Trust Seminars, Conferences and following relevant updates on Wildnet (Wildlife Trusts Intranet).
- c. Ensure the post is compliant with all aspects of GDPR.
- d. To ensure all work carried out complies with equal opportunities and Health and Safety policies and procedures.
- e. Undertake any other duties required by the line manager.

POST SPECIFICATION

We are a leading Wildlife Trust with over 170 staff and over 26,500 members. A thriving individual giving programme is vitally important for the long term future of the Wildlife Trust.

This is a crucial role in the marketing team needing enthusiasm, positivity and team working. A determined yet friendly, professional and resourceful approach will be required whilst dealing with a wide range of people and situations.

This is a key role in our marketing team, with opportunities for personal development and to play a significant part in our success.

The post holder will have to undertake a range of duties which will include:

- Regular liaison with a range of contacts. These include employees and officers of the Wildlife Trust, other bodies and all existing and potential donors.
- Managing ongoing relationships in association with colleagues.
- Offering administration support on many different projects where exceptional attention to detail will be key.
- Maintaining up to date knowledge of all relevant areas of membership administration and donor development.
- A dedicated approach to delivering the best possible customer service both internally and externally.
- A current driving licence, a car and full insurance cover for personal business use is required.

This job description serves to illustrate the type and scope of the duties currently required for the above post to provide an indication of the required level of responsibility. It is not a comprehensive or exhaustive list and duties may be varied from time to time, they will not however change the general character of the job or the level of responsibility entailed.

PERSON SPECIFICATION

JOB TITLE Individual Giving Officer

This section details the experience, skills, knowledge and personal qualities required for the post.

Experience	Essential	Desirable
Using contact database/CRM systems	√	
Confidence in dealing with people over the phone, by email and in person.	√	
Dealing with the public/general enquiries	√	
Analysing and interpreting database information	√	
Planning and running events	√	
Giving presentations to groups of people		√
Project management- experience of delivering small projects.		√
Working with volunteers		√
Delivering legacy and in memoriam giving programs	√	
Developing and delivering major giving programs		√
Developing and delivering multi-channel fundraising appeals	√	
Knowledge		
High level of general IT competency particularly Microsoft office and excel	√	
Understanding of relevant fundraising regulations	√	
Fundraising and donor development techniques	√	
Understanding of the Voluntary Sector		√
Skills		
Excellent oral and written communication skills	√	
Ability to develop working relationships with a wide range of people	√	
Ability to operate, maintain and monitor contact information systems	√	
Ability to develop creative ideas and a pro-active attitude in 'making things happen'	√	
Ability to set, prioritise and achieve targets on time	√	
Personal qualities		
Ability to communicate with enthusiasm, tact and diplomacy	√	
A proactive attitude to 'making things happen'	√	
Ability to work independently or in a team	√	

GENERAL TERMS AND CONDITIONS

Salary:	£21,848.40 per annum.
Pension:	The Trust contributes to the NEST pension scheme. Full details will be provided.
Hours of Work:	Full time hours - 37.5 hours per week. Overtime is not paid but time off in lieu may be taken, where appropriate, as the post will sometimes involve evening and weekend working. Usual office hours are 9am to 5pm, Monday to Friday.
Duration of post:	This post is permanent. All new employees undertake a probationary period of 6 months, in which time they are expected to demonstrate their suitability for the post.
Holidays:	25 days, plus 3 occasional days per annum taken during the Christmas period.
Place of work:	The Wildlife Trust's Head Office: The Barn, Berkeley Drive, Bamber Bridge, Preston, PR5 6BY.
Other:	The Wildlife Trust operates a no smoking policy at all its offices. The Wildlife Trust is an equal opportunities employer and is positive about those covered by the Equality Act 2010.
Policy:	All staff are required to abide by organisational policies and procedures.
Closing date for applications:	Wednesday 13 th February 2019
Interviews:	Monday 25 th February and Wednesday 27 th February 2019

Criteria Common to All Job Descriptions:

A Job Description sets out the purpose of the job, where it fits into the Trust's structure, the context within which the job holder functions and the principal accountabilities of job holders, or the main tasks they have to carry out. It is not a definitive work plan. This document is intended to provide guidance on the scope and function of the job.

Equal Opportunities Statement:

All employees are required to adhere to and promote the principles and operation of the Trust's policies on equalities, to ensure that services provided are relevant to ethnically diverse communities and other disadvantaged groups in the area.

Health and Safety Statement:

All employees are required to ensure that all duties and responsibilities are discharged in accordance with the Trust's Health and Safety at Work Policy and the Health and Safety File. They should take reasonable care for their own Health and Safety and that of others who may be affected by what they do or do not do. Staff should correctly use work items provided by the Trust including personal protective equipment in accordance with training or insurance. All members of Trust staff are responsible for informing their line managers of any potential gaps in the current Trust Policy. All employees are responsible for ensuring that Health and Safety Policy is up to date and continuously reviewed and evaluated.

Performance Review:

All employees will participate in the Trust's Performance Review process. The process aims to ensure that performance standards/targets are jointly agreed between employees and line managers and are achieved within agreed time scales. Failure to maintain an appropriate standard indicated by management can result in Capability proceedings being taken.

Commensurate Statement:

At times, the Post holder will be required to undertake other duties and responsibilities of a similar level and nature in order to support workload peaks and resources and skill shortages, ensuring priorities are met. This will be sensitive to available resources and individual skills and will generally be within the same area.

Adherence to Staff Handbook, Policies and Procedures:

The Trust is a large, diverse charitable organisation and as such needs to ensure that all employees are aware of their obligations to and from the organisation. These are clearly defined in the Staff handbook, the Intranet and in the policies and procedures adopted by Council as part of the Trust's governance. All Employees have an obligation to read and understand these policies, especially those that are pertinent to this role.