



## **Individual Giving & Legacy Manager**

Accountable to:	Head of Fundraising & Communications
Location:	Cardiff (however we have offices around Wales and fully support flexible working). Occasional travel throughout Wales when required.
Hours:	35 hours per week (full time).
Salary:	Starting salary £32,630 per annum

### **Role Overview:**

As an experienced and talented fundraiser, the Individual Giving and Legacy Manager will be directly responsible for growing and developing the Individual Giving and Legacy programme at St Johns Ambulance Cymru.

With the full support of the Head of Fundraising, the postholder will take a lead role in delivering an effective Individual Giving programme, maximising supporter recruitment and long-term income growth for the charity. Working with third-party agencies to manage the planning, development, implementation, and evaluation of Door to Door, Face to Face, Telephone, Digital and Direct Mail activity to maximise contribution and loyalty from new supporters.

The Individual Giving and Legacy Manager will be responsible for focussing on increasing our support across digital channels, building new cases for support for our appeals, and identifying new fundraising opportunities, driving forward existing ones and build on relationships.

The postholder will also lead the charities work in Legacy Giving, substantially growing the income generated from this fundraising stream over the medium to long-term.

Maintaining and building excellent relationships both internally and externally, the postholder will be a collaborative member of the fundraising team, adapting the workplan as necessary to support the priorities of the wider team and organisation as a whole.

## **The first aid charity for Wales**

## **Key duties and responsibilities:**

### **Income Generation**

- Devising and implementing an effective plan that delivers ambitious targets across the Individual Giving portfolio. This includes donor acquisition from Door to Door, Face to Face, Telephone, Direct Mail, Lottery and Digital.
- Developing and implementing a legacy pipeline, including promotion, marketing and stewardship plans.
- Developing and implementing operational plans to recruit new supporters and ensuring an integrated approach to marketing communications and donor development.
- Developing and implementing a welcome programme to drive loyalty and reduce early attrition from newly recruited donors.
- Monitoring market trends and developments for supporter acquisition across all communications channels.
- Managing targeted and cost-effective direct marketing campaigns (including appeals and raffles) to develop cash donations and regular giving.
- Managing the relationships with fundraising agencies and suppliers to recruit direct debit donors via door-to-door, telephone, and face-to-face initiatives, and providing strategic insight and recommendations for best practice future campaigns.
- Implementing and reviewing digital fundraising recruitment activities such as Facebook advertising, online campaigns or video campaigns.
- Ensuring best practice supporter care is in place for managing the response to all recruitment activity.
- Supporting the development of a strong case for support for St John Ambulance Cymru, building successful campaigns around it.
- Supporting the delivery of multi-channel campaigns for our appeals in conjunction with the Marketing and Communications Team.
- Leading on data management including consent from a GDPR perspective, ensuring donors are approached about relevant campaigns and not solicited inappropriately.
- Recruiting and managing relationships with ambassadors and champions for campaigns where appropriate.

### **Budget Responsibilities**

- Achieving an ambitious income target that supports the delivery of our work at a national, regional, and local level.
- Liaising with the finance team to ensure full and accurate reporting of income, expenditure, and pledges through our accounts process.
- Contribute to delivering the overall Fundraising strategic goals through growth across the individual giving and legacy programme.
- Contribute to the preparation and management of budgets.

## **Team and Database**

- Supporting the implementation and delivery of the fundraising strategy.
- Producing accurate and timely reporting on progress against personal work plan and targets to the Head of Fundraising, identifying challenges and communicating potential solutions proactively and timely.
- Maintaining accurate and up-to-date database and records on community and event participants, including contact history, forthcoming actions and accurate financial recording.
- Representing the Fundraising team through engagement with stakeholders, volunteers and the wider public.
- Supporting the development of a high performing team through informative communication and flexibly taking on appropriate tasks as needed.
- Supporting the Head of Fundraising to deliver strategic initiatives to improve team performance and provide oversight in relation to the team's workload when requested.

## **General Duties**

- Liaising with other departments within St John Ambulance Cymru to help identify cross working opportunities where relevant.
- Adhering to all St John Ambulance Cymru's standards, policies, and procedures.
- Complying with the data protection regulations, ensuring that information remains confidential.
- Working in a manner that facilitates inclusion, particularly those who are deemed vulnerable.
- Taking an active role in the overall planning and team meetings and contributing to the continued development of the fundraising programme.
- Keeping abreast of fundraising developments in general and in the charity sector in particular, especially through the use of peer networks, trade bodies and press.
- Contributing to annual business planning.
- Being responsible for administration, ensuring that the database is accurately maintained.
- Representing St John Ambulance Cymru in local media as required.
- Speaking on behalf of St John Ambulance Cymru at events and presentations as required.
- Undertaking any other reasonable duties as requested by the Head of Fundraising.

This job description is intended as an outline indicator of general areas of activity and will be amended in light of the changing needs of St John Ambulance Cymru. It is expected that the post holder will be as positive and flexible as possible in this regard.

## Person specification

Requirements	Essential	Desirable	Assessment Method
<b>Qualifications</b>			
Professional fundraising qualification		✓	Application form
Membership of the Institute of Fundraising		✓	Application form
<b>Experience</b>			
Working within a team and good communication	✓		Application/ Interview
Innovation and creation of new fundraising products, projects and/ or appeals	✓		Application/ Interview
A proven track record in meeting income targets within a defined timescale, including the ability to independently monitor progress against personal income targets, identifying challenges and solutions for timely communication to senior staff	✓		Application/ Interview
Substantial relationship development and management experience	✓		Application
Experienced in working with external agencies	✓		Application/ Interview
Proven experience of working with donor databases, ideally Raiser's Edge	✓		Application/ Interview
Working knowledge of legalities and regulations regarding fundraising practices, e.g. Data Protection, IoF, Codes of Practice, Charity Law	✓		Application/ Interview
Experienced in using digital channels to generate income	✓		Application/ Interview
Experienced in developing and delivering plans and budgets	✓		Application/ Interview
<b>Skills, knowledge and abilities</b>			
Excellent knowledge of individual and legacy funding opportunities	✓		Application/ Interview
Strong business development and project management skills		✓	Application/ Interview
Excellent proposal writing, presenting and	✓		Application/ Interview

influencing skills in fundraising			
Ability to build and maintain effective networks internally and externally	✓		Interview
Proactive with a high level of initiative and enthusiasm, encouraging others to do the same	✓		Interview
Ability to manage and resolve conflicting priorities and team and stakeholder concerns	✓		Application/ Interview
An understanding of fundraising issues impacting Individual Giving income and the wider charity sector and funding climate		✓	Application/ Interview
IT skills including Microsoft Word, Excel, PowerPoint and Outlook and CRM systems	✓		Application/ Interview
Excellent relationship-building skills	✓		Interview
<b>Personal Attributes</b>			
Ability to quickly build rapport with others	✓		Interview
Ability to conduct and present self in a highly professional manner at all times	✓		Interview
Can communicate in a persuasive manner and demonstrate strong interpersonal skills	✓		Application/ Interview
Self-motivated and a positive attitude	✓		Application/ Interview
Resilient and adaptable, able to work well under pressure and thrive on being given challenges and responsibility	✓		Application/ Interview
Able to demonstrate commitment to St John Ambulance Cymru values and behaviours	✓		Application/ Interview
Willingness to continually update skills and knowledge	✓		Application/ Interview
<b>Special Requirements</b>			
Flexible to work outside normal working hours	✓		Interview
UK driving license and access to own vehicle to travel to events and appointments	✓		Application
Willingness to work flexibly, including travel and weekend and evening work	✓		Interview