

Head of Donor Care & Legacies – Job Description

Job Location:	Head Office, Edinburgh
Responsible to:	Director of Fundraising
Responsible for:	Database Co-ordinator Donor Care Officer Legacy Fundraising Officer Tribute Giving Manager

1. Introduction to Chest Heart & Stroke Scotland

NO LIFE HALF LIVED

Everyone has the right to live life to the full. After a diagnosis of a chest or heart condition or a stroke, many people experience fear and isolation and struggle with the impact on their lives. Chest Heart & Stroke Scotland won't stand for that. The care and support we deliver every day ensures everyone can live the life they want to.



Our Vision: welcome to a Scotland where people with our conditions can live their lives well. Full lives, with the right support, at the right time and in the right place. A place where you can shape your future and live the life you want to lead.

Our Mission: welcome to a community where people can support each other, secure the expert help they need and collectively advocate for the care that matters to them. Welcome to the charity that never underestimates the power of a cup of tea, a conversation started, a recovery begun.



No Life Half Lived means we need to listen to people with our conditions and deliver well for them. We have identified **four goals** to get us there.

We will place our focus on **addressing the unmet needs** of people with our conditions - social, emotional, and physical - across all Scotland's communities.

We will be **led by our people:** people with lived experience of our conditions, their families & carers, friends, colleagues and healthcare professionals.

We will **secure the funding required to deliver via a diverse income portfolio that is consistent with our values** and ethical approach.

We will be **effective and accountable** in all that we do.

We have developed **six values** to guide us in delivering against our goals:

Agile: we will be able to adapt to the needs of our people and the environment we work in.

Innovative: we will look for improvement in what we currently do and be creative in developing new services.

Inclusive: we will adopt a human rights based approach to our work and ensure we are accessible.

Accountable: we will take ownership for our work and hold decision makers to their responsibilities.

Collective: we can only achieve our goals by working together and learning from each other.

Courageous: we will say what needs to be said and do what needs to be done to meet our goals.



2. Job Purpose

The purpose of this role is to:

- a) deliver the outcomes identified in the recently agreed Strategy for Growth through the management of a number of centralised fundraising activities;
- b) increase legacy pledges and long-term legacy income through stakeholder engagement and development;
- c) be a part of the Fundraising Department's leadership team; and
- d) be a part of the CHSS Operational Management Team with responsibilities across the charity.

3. Key Challenges

The challenges are exciting. CHSS has recently agreed its new positioning statement - "**no life half lived**" - and its new strategy - "**a matter of life and health**" - which aims to double our reach over the next five years.

- Delivering the Strategy for Growth, which aims to double gross income over the next five years: key areas of focus are Donor Acquisition and In Memoriam fundraising;
- There will be change to manage (eg: systems and processes, alignment of the team) to ensure the strategy can be delivered;
- There are a number of co-dependencies to be managed (eg: Marketing sits in the Communications Department; our supporter databases are not consolidated - volunteers sit elsewhere).

4. Key Responsibilities

- a) Doubling income as agreed in the Strategy for Growth through the management of certain centralised fundraising functions. The role is responsible for:
- A large-scale Donor Acquisition programme and on-going donor engagement, support and care to deliver agreed income growth over five years, high retention and satisfaction levels, with the ultimate objective of increasing legacy pledges;
 - On-going management of general donors - ad hoc, appeals, committed and regular givers - with the same aims;
 - The continuing development of In Memoriam giving, including Tribute Funds, to deliver agreed income growth over five years, increased numbers of funds, increased cross-selling of other fundraising products, with the ultimate objective of increasing legacy pledges;
 - The on-going development of the over-arching fundraising proposition and sub-propositions for Individual Giving products.
- b) Increasing legacy pledges and long-term legacy income through stakeholder engagement and development. The role is responsible for:
- The development and delivery of a new legacy marketing programme;
 - The development and delivery of a new legacy engagement strategy;
 - The management of legacy income.
- c) Management and leadership:
- As part of the Fundraising Department's leadership team, the role supports the Director in departmental decision making. The post-holder will contribute to the development of new ways of doing things to better meet directorate goals, and will be expected to take account of the wider and longer-term consequences of their own and others' ideas, recommendations and decisions;
 - As part of the charity's Operational Management Team, the role plays an active part in operational concerns across CHSS and will be expected to take account of the wider and longer-term consequences of their own and others' ideas, recommendations and decisions. The post-holder will develop excellent relationships at this level;
 - As manager of a team, the post-holder will direct and support their staff to achieve agreed outcomes.

5. Key Results/Objectives

- Delivery of income growth (to double income over five years) through a focus on:
 - In Memoriam income
 - A large-scale donor acquisition campaign
- Increase in legacy pledges and long-term legacy income
- Delivery of exceptional donor care to maintain high satisfaction levels
- Challenges overcome through thoughtful solutions
- Positive, reflective change management
- Positive staff management, delivering high morale and low turnover

6. Dimensions

Budget responsibility: the post-holder is responsible for current direct expenditure of c £80,000. This will increase to c £400,000 p.a. from 2019-20.

Staffing responsibility: the post-holder is currently responsible for a team of five, but this is likely to increase.

Contacts:

(Internal)

Head of Supporter Fundraising and team

Fundraising Systems & Support team

Director of Communications and team, including Marketing Manager and

Content & Information Advisor

Director of Service Delivery and team, including Head of Clinical & Partnership Services and Head of Rehabilitation Support

Head of Finance and team

Head of Human Resources and Organisational Development

(External)

Solicitors

Fundraising and marketing agencies

Fulfilment agencies

Other agencies/suppliers

People with lived experience of our conditions and their families

Other supporters and the general public

The above job description is not exhaustive and is clarified to include broad duties inherent in the post. Evaluation and development of this post may, in time, indicate a need to revise duties herein.

Person Specification

	Essential	Desirable
Education and Knowledge	<ul style="list-style-type: none"> • Full membership of the Institute of Fundraising (ie holding the Certificate in Fundraising) or a professional marketing qualification • Evidence of continuous professional development in either fundraising or marketing • Knowledge of key fundraising/marketing principles across both donor acquisition and development • Knowledge and understanding of the effective use of RE (or other CRM) and data management to deliver results • Understanding and awareness of the key issues affecting fundraising and the charity sector, including knowledge of relevant regulations (GDPR, Code of Fundraising Practice) 	<ul style="list-style-type: none"> • IoF Diploma in Fundraising • Lottery rules and regulations
Previous Experience	<ul style="list-style-type: none"> • Developing and delivering a strategic plan at a senior level; • Delivering and managing change • Recruiting, managing and motivating staff to maintain high levels of performance • Setting, managing and monitoring of budgets and other KPIs • Improving systems and processes to increase effectiveness • Developing and delivering effective marketing campaigns (eg: direct mail, legacy marketing), taking account of inter-departmental dependencies • Developing and delivering an effective donor recruitment campaign 	<ul style="list-style-type: none"> • In Memoriam fundraising • Lottery or Raffle
Skills Aptitudes Abilities	<ul style="list-style-type: none"> • Ability to communicate effectively, both verbally and in writing, adapting style to suit audience • Ability to develop effective and supportive relationships with colleagues • Excellent people management skills 	<ul style="list-style-type: none"> • Excellent copy writing skills
Disposition	<ul style="list-style-type: none"> • Commitment to ethos of the voluntary sector • Commitment to equal opportunities • Willingness to work flexibly, including out-of-hours 	

Summary of Terms and Conditions of Employment

Term:	Permanent
Salary:	Grade 2, Scale Points 39-47, £35,830 – £43,362 per annum
Hours of work:	32.5 hours per week (CHSS full-time is 32.5 hours) Willingness to work flexibly including travel and, on occasion, to stay away from home
Review of Work:	The postholder is subject to the CHSS objective setting, supervision and appraisal process.
Annual Leave:	CHSS leave year runs from 1st April to 31st March. Employees are entitled to 36 days annual leave in their first year of service (including public holidays). An employee will be awarded one extra day's annual leave for each complete year of service up to a maximum of 42 days (including public holidays). These allowances are pro-rated for part time employees and further pro-rated for those who join or leave CHSS during the leave year.
Pension scheme:	<p>CHSS offers a Group Personal Pension Plan, which has been established with Aviva. The Plan is a money purchase arrangement. You can choose at what rate you wish to contribute (subject to a minimum age related contribution) and how to invest your own contributions and those made by CHSS. The emerging fund at the point that you wish to take the benefits is then used to purchase a pension that is paid for the rest of your life.</p> <p>Employee's and Employer's Contributions are paid on the portion of the employee's salary which is above the National Insurance contributions threshold (the Lower Earnings Limit). Employees who meet the relevant criteria are "automatically enrolled" in the scheme.</p> <p>There are also schemes which provide death-in-service benefit and permanent health insurance.</p>
Equal Opportunities:	CHSS is committed to equality of opportunity and to no discrimination on the grounds of race, religion or belief, age, sex, marital or civil partnership status, disability, sexual orientation, transgender status, pregnancy or maternity.