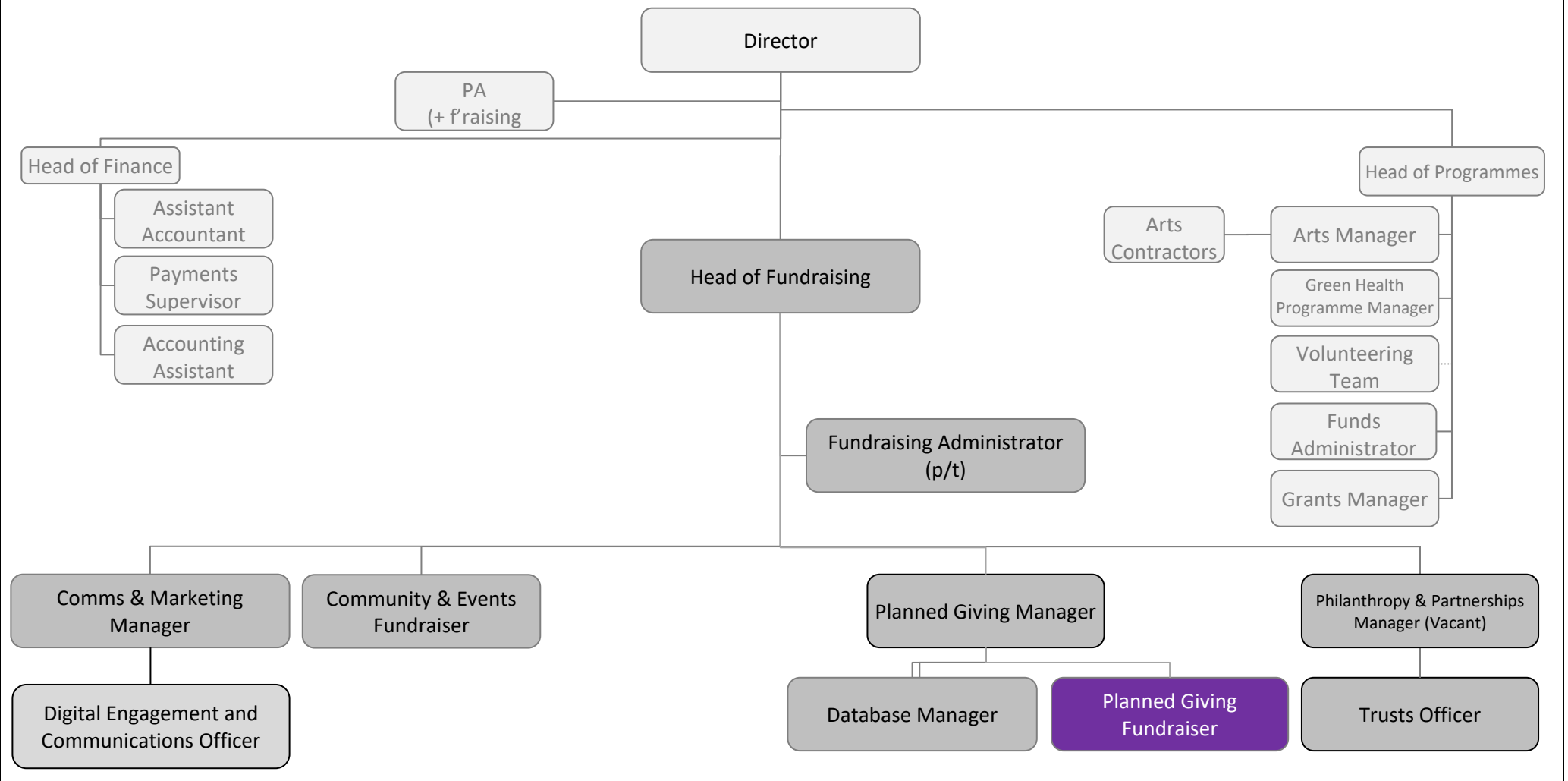


Planned Giving Officer Fundraiser

1. JOB IDENTIFICATION
Job Title: Planned Giving Fundraising Officer Responsible to: Planned Giving Manager Department(s): Finance Directorate: Operating Division: NHS Lothian Charity Job Reference: L-FIN-NHSLC-PGFO No of Job Holders: One Last Update: September 2022
2. JOB PURPOSE
To lead on the development of effective marketing to individuals and legacy prospects, resulting in an increase of income over time. To build relationships with individual donors and legacy pledgers with effective supporter stewardship techniques. To design and deliver supporter journeys to regular donors, in-memory donors and legacy pledgers. To stabilise donation and legacy income and forecasting and create a pipeline of legacy pledgers. To develop an In Memory giving product and marketing plan including a link to Legacy Marketing and stewardship. Support the Planned Giving Manager to deliver inspiring appeals to individuals and legacy prospects.
3. DIMENSIONS
<u>Staffing Responsibilities:</u> There are no line management responsibilities. This post is responsible for managing relationships with external agencies and providers. <u>Training responsibilities:</u> Provide regular training and advice to Charity staff/Trustees as well as NHS Lothian clinical staff about conducting sensitive giving and Legacy conversations. <u>Financial Responsibilities:</u> The post currently is responsible for ~ £1.2m income and £10,000 expenditure.

The postholder is employed within NHS Lothian and there may be a requirement to work flexibly across Lothian to meet service demands.

4. ORGANISATIONAL POSITION



5. ROLE OF DEPARTMENT

NHS Lothian Charity is a registered charity which is regulated by the Office of Scottish Charity Regulators (OSCR). The Foundation provides a comprehensive endowment management and administration service to NHS Lothian. It is the official charity of NHS Lothian.

Specifically:

Guide and support the Charity Trustees to meet regulatory requirements of OSCR.

Provide to the Trustees the financial information required for effective and appropriate decision-making, procuring expert advice and guidance where necessary.

Provide to the Charity Director a comprehensive endowment management and administration service.

Provide to the Fund Stewards a quality endowment management, guidance and administration service.

Provide a quality grant pathway from initial enquiry to file closure.

On behalf of NHS Lothian Board manage the Arts in Health and Wellbeing and Green Health strategies.

Raise funds through a quality, supporter-focused fundraising plan.

6. KEY RESULT AREAS

1. Working closely with and supported by the Planned Giving Manager, responsible for establishing, developing and delivering the individual giving, Legacy and In Memory strategy for growth in income and supporters.
2. Manage the donation and legacy income and expenditure budget including monitoring progress against targets, reforecasting income and expenditure as required. Provide regular monthly reports including the Legacy income pipeline.
3. Develop a programme of excellent stewardship; creating journeys relevant to our audience segments.
4. Support with the delivery of marketing campaigns to grow support from our audience segments.
5. Through research and utilising focus groups, develop new products and materials to recruit and steward supporters. These include, but not limited to, case studies, mailings, telephone campaigns, gifts in Wills promotion and events, lottery product.
6. Responsible for engaging supporters, donors, staff, volunteers and patients about the benefits of gifts in Wills.
7. Develop training/materials for NHS Staff so that they have the right information should they be asked about leaving a gift in a Will.
8. Provide support and training to the NHS Lothian Charity team to have conversations with supporters about leaving a gift in their Will. Ensure that legacy messaging is

included in communications and stewardship across the fundraising, marketing and communications team.

9. Responsible for ensuring all supporter enquiries, including complaints, are dealt with efficiently, compliantly and with sensitivity. Deliver on the governance of legacy notifications and intimations and liaise with executors and solicitors.
10. Use the CRM system to record and evaluate activities, provide analysis and projections for decision making.
11. Be aware and work within the Fundraising Regulator's Code of Fundraising Practice and other relevant legislation with regards to the fundraising activities undertaken.
12. Contribute to the Fundraising Team's annual budgets, targets and plans as agreed by the Head of Fundraising and contribute to the planning process for Planned Giving.
13. Ensure compliance with all relevant legislation including the Charities Act, GDPR and PECR.
14. Work with the Planned Giving Manager and all team colleagues with updates through regular team meetings, ensuring that all activities are reported and seeking necessary support when greater resources are required. Share new ideas for potential improvement or opportunities.
15. Attend and assist at activities and events as part of the wider fundraising team.
16. Support NHS Lothian's values of quality, teamwork, care and compassion, dignity and respect, and openness, honesty, and responsibility through the application of appropriate behaviours and attitudes.

7a. EQUIPMENT AND MACHINERY

Essential user of Personal Laptop and networked systems within NHS Lothian. Use of office equipment: PC, photocopier, printer/scanner, smartphone for digital content and camera, telephone.

Note: New equipment may be introduced as the organisation and technology develops, however training will be provided.

7b. SYSTEMS

Frequent day-to-day user of MS Office suite of software including Excel, Word, Outlook, PowerPoint and Project including the internet and social media.

Use of Customer Relationship Management (CRM) systems such as Access CRM (formally Thank Q).

Use of third party online giving platforms e.g Mailchimp, Just Giving etc

Note: New systems may be introduced as the organisation and technology develops, however training will be provided.

8. ASSIGNMENT AND REVIEW OF WORK

Expected to manage objectives and workload autonomously.

Objectives will be agreed annually with the Planned Giving Manager. The post holder is responsible for ensuring delivery of those objectives within the obligations of the post. Formal review will take place at mid-year and year-end. Update of objectives and review of progress will also take place through regular 1:1 meetings with the Head of Fundraising.

The day to day work of this post is self-directed in order to support delivery of the organisational strategic plans. Workload management is the responsibility of the post holder. The post holder is required to prioritise workload to ensure all the demands of the organisation are understood and all necessary deadlines are met.

The post holder's work will also be informed by issues and developments arising from external enquiries and opportunities. In addition, ad hoc assignments may be requested.

9. DECISIONS AND JUDGEMENTS

Required to develop and produce targets and KPIs for fundraising activities and to input into the Fundraising report for Trustees and Committees and other internal reports.

To review and analyse the pipeline of Legacy pledgers to forecast income and advise on the risk of this large income stream.

Required to work autonomously, guided by sector policy, regulations and best practice and taking into account agreed departmental and organisational strategic priorities, interpreting how these apply to work.

10. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB

Knowing and understanding the business of the Charity and its complex interrelationship with NHS Lothian and other connected charities, and the broader voluntary sector and competitive fundraising landscape.

Understanding and keeping up to date with the vast scope of the activities across NHS Lothian that the Charity supports.

Establishing a culture of sensitive legacy conversations with other team members/Trustees/NHS Clinical staff.

Meeting with and talking to donors about their motivations for leaving a gift in their Wills or giving an In Memory gift in a sensitive and empowering way. There may be occasional personal stories that are shared that could cause upset.

11. COMMUNICATIONS AND RELATIONSHIPS

The postholder will be required to maintain key relationships and effective communication with a range of donors and supporters as well as external organisations such as marketing specialists.

Communication will need to be appropriate and sensitive to the subject matter and to meet the requirements of the recipient(s), including marketing materials, case studies, newsletter articles, updates and reports to Legators, executors, families etc.

The information being communicated may often be complex: patient experience improvement programmes, capital projects, clinical research etc to be conveyed in a clear and concise manner for non-medical audiences.

Information is be required to be communicated in a sensitive and respectful manner to families or executors of people who have died, or those who are considering/pledged to leave a gift in a Will.

Examples of key relationships include:

Internal:

NHS Lothian Charity colleagues.

Senior Management such as Director of Capital Planning & Projects, Associate Medical and Nursing Directors (about fundraising Cases for Support relevant to their area).

Senior Clinicians, Clinical Service Managers and Clinicians (As above).

Specific Fund Stewards (as above).

External:

Third party agencies and contractors such as platform providers, marketing/design agencies, mailing houses etc.

Solicitors and Executors of Wills.

Current and potential Donors and Legators.

Family and friends of people who have passed away.

12. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB

Physical:

On a regular basis sit at a desk using a PC/laptop for long periods of time inputting data and preparing written reports.

Mental:

Requirement for translating complex and sometimes technical information or jargon into easily understandable layman's terms.

Prolonged concentration is required when drafting copy writing materials and publications, and for managing the database and analysing data.

Multi-tasking is required, with interruptions from telephone, colleagues and email.

Need to reprioritise work, and prepare information at short notice.

Emotional:

High degree of personal resilience, especially in relation to speaking to families and executors of people who have passed away, or to people considering/pledging to leave a gift in a Will.

Confidence when representing the Charity through a range of media including public speaking which demands the ability to influence and persuade stakeholders.

Environmental:

Required to maintain discretion and consider others whilst working within an open plan office environment.

Frequently spends long periods of time using a PC.

Occasional travel to meetings and events in the Edinburgh and Lothians region, to meet NHS Lothian staff members leading on projects for the development of individual giving and legacy fundraising as well as writing reports and updates to donors, legators, families and executors.	
13. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB	
Educated to degree level in a relevant subject OR significant relevant experience of Legacy/Planned Giving fundraising. Membership of the Chartered Institute of Fundraising. Knowledge of Fundraising Regulator's Code of Fundraising Practice and other relevant legislation including Health and Safety. PLUS Proven track record of managing significant income through individual giving and/or legacy and In Memory fundraising. Product development experience including research, budget and monitoring. Delivering excellent donor stewardship. Experience summarising complex issues in a concise and easily understood way. Managing and reporting on income, progress against targets and KPIs. Data analysis, management and reporting. Excellent interpersonal and influencing skills and ability to build meaningful relationships with stakeholders. Excellent IT skills including database management. Excellent communication skills, with an excellent standard of written English, in particular a clear and articulate, persuasive written style.	
14. JOB DESCRIPTION AGREEMENT	
A separate job description will need to be signed off by each job holder to whom the job description applies. Job Holder's Signature: Head of Department Signature:	Date: Date: