Participation Giving Officer
External Relations

Closing date: 20 November 2017
Interview date: 13 December 2017
Vacancy reference: 6130
INTRODUCTION

The Office of Philanthropic Partnerships and Alumni (OPPA) is the central support function at the University of York with responsibility for:

- forming transformational philanthropic partnerships with individual donors, charitable trusts and companies
- engaging York’s global alumni body in programmes to support current students and the University’s strategic priorities
- leading and managing volunteering opportunities within the University for our alumni and other friends.

The team works to a series of annual targets and objectives which are devised by the OPPA Senior Management Team (SMT) and aligned to the University’s Strategic Plan: to deliver excellence in research, an outstanding and valuable experience for our students and outstanding teaching and learning.

In 2016 the University Executive Board agreed a plan to deliver the first fundraising and volunteering campaign for York. The University is in the quiet phase of the campaign which will provide an exciting, challenging and rewarding experience to all involved.
Main purpose of the role

- To contribute to the development of Participating Giving strategy and successfully lay the foundations for donor progression. The Participation Giving Officer (PGO) is a key role within the PG team and working alongside the Student and Young Alumni Officer will maintain and develop existing fundraising programmes and contribute to the establishment of new income streams which will over time generate increasing philanthropic income for the Giving to York, York's Participation Giving Programme.

- Using a data and donor-centred solicitation plan, the primary responsibility of the role is the management of the University's telethon campaigns which currently focus on UK, US and European alumni and are integrated with direct mail, Email and crowdfunding activity as appropriate. The role will support legacy development through the delivery of bespoke legathon activity to create leads for the Philanthropy Officer, Legacies and Planned Giving.

- The PGO will take responsibility for additional direct fundraising appeals and campaigns, implementing an agreed plan developed with the Head of Participation Giving and based on the Participation Giving strategy. These will include the development of community fundraising, collaboration on the young alumni programme and support for other fundraising initiatives eg Community events, Staff giving, as appropriate.

- The role will help to create a culture of philanthropy amongst the University community, raising the profile of the impact of giving amongst current and future supporters. This will include the management of the YuFund Disbursement Committee by which a proportion of philanthropic income is distributed to suitable projects.

Key responsibilities
(Role holders will be required to undertake some or all of the duties below)

Contribute to the development of the Participation Giving strategy for staff, alumni and friends, in conjunction with the Head of Participation Giving

- To work with University colleagues and departments to develop compelling Cases for Support, for the University that will encourage alumni and friends to donate to York and which align with York's fundraising campaign priorities

- To support the development of sophisticated methods of selecting and targeting prospects from the Raisers Edge database in line with changes in fundraising solicitation guidelines and legislation.

- Liaise with members of the IPOM team to ensure a consistent and accurate approach to data management, ensuring compliance with the data protection act, fundraising regulator and Information Commissioners Office

- To implement integrated Giving to York campaigns across the telephone, direct mail, email solicitations targeted at alumni,

- Contribute to the development and implementation of donor cultivation and stewardship cycle for participation giving, ensuring that donors are thanked renewed and upgraded through a systematic programme using appropriate project examples.

- Monitor campaign results, assess against benchmarks and identifying areas for improvement.
JOB DESCRIPTION

To manage and develop the University's telephone fundraising operation YuCall;

- Manage the telephone callroom, developing and improving processes including PCI compliance. This includes managing one shift per week during calling (evening and weekends) and others as necessary to support the supervisor team
- To recruit, train, supervise and motivate a team of up to 50 student fundraisers and senior fundraising team, including caller rota, payroll approval and reconciliation with payroll budget
- Monitor and manage the team's performance, provide ongoing reviews, regular appraisals and coaching as well as additional training to maintain professional standards and identify talent.
- Manage and monitor telephone campaign software, ensuring data captured and stored
- To monitor YuCall KPIs, reporting weekly to Head of Participation Giving and monitor the YuCall budget
- Managing the telephone campaign follow up, including responding promptly to information requests and follow up and/or pledge chase monitoring
- Support legacy development through the delivery of bespoke legathon activity in collaboration with the Philanthropy Officer, Planned Giving.

To be responsible for the delivery of additional fundraising campaigns and appeals eg International and departmental / project specific campaigns.

- Prepare written materials for direct appeals including letters, emails and fulfilment packs, liaising with the Head of Participation Giving and the OPPA communications team.
- Develop a community fundraising offer aimed at alumni and friends, and support constituents wishing to engage in independent fundraising on behalf of the University.
- To support the development of campaigns aimed at new constituencies such as current staff, former staff, parents and friends

To support the development of a culture of philanthropy on campus, increasing the profile of YuOpportunities and fundraising campaigns

- In collaboration with the Student and Young Alumni Officer and in liaison with the Communications manager ensure the integration of campaigns and initiatives within on campus communications
- Manage the YuFund Disbursement Group, grant making process for donated funds;
- Support the development and delivery of the Big Alumni Project, both as an award and an opportunity for fundraising from alumni
- Support the fundraising associated with community participation events

To support the overall activities of OPPA

- To act as an internal and external advocate for the YuFund and Giving to York
- To play a pivotal role in the identification and cultivation and asking of key donors who are capable of more significant support; Taking responsibility for a portfolio of prospects.
- To include and promote Legacy messaging within Giving to York activity
- To produce reports for internal audiences as required;
- Other activities that the Director of OPPA may assign from time to time
- To keep abreast of the professional and regulatory framework and new developments in fundraising;

Other reasonable duties within the scope and grading of the post - to support the mission of OPPA
## PERSON SPECIFICATION

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<tr>
<th>Qualifications</th>
<th>Essential / Desirable</th>
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<tbody>
<tr>
<td>Educated to degree level or equivalent</td>
<td>Essential</td>
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<td>A marketing or related qualification</td>
<td>Desirable</td>
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<tr>
<th>Knowledge</th>
<th>Essential / Desirable</th>
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<tr>
<td>Knowledge and understanding of the principles of regular giving programmes, legacies and philanthropy</td>
<td>Essential</td>
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<td>An understanding of tax effective giving in the UK</td>
<td>Desirable</td>
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<th>Skills, abilities and competencies</th>
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<td>Strategy development and target setting</td>
<td>Essential</td>
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<td>Understanding of the role of regular giving and legacies in a development programme</td>
<td>Essential</td>
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<td>Excellent understanding of data and databases (ideally Access or Raisers Edge) and general IT skills</td>
<td>Essential</td>
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<td>Strong management skills</td>
<td>Essential</td>
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<td>Organisation skills and project management- able to plan, implement resource and monitor to ensure achievement</td>
<td>Essential</td>
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<td>Communication skills- excellent all-round communicator: Clear, concise and accurate written and oral communication; able to network and form collaborative relationships with many different types of people both internally and externally; persuasive and influential; excellent ambassador; confident and comfortable in dealing effectively with senior individuals; a customer-service orientated perspective</td>
<td>Essential</td>
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<td>Communicating complex data- development and presentation of relevant statistical data in a concise and accessible manner.</td>
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<td>Face to face communication with colleagues, alumni and friends, including the delivery of presentations to high level internal and external audiences</td>
<td>Essential</td>
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<td>Ability to define priorities and work flexibly and effectively under pressure to meet demanding (and sometimes conflicting) deadlines, within set time and financial constraints</td>
<td>Essential</td>
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<td>Judgment and sensitivity - demonstrates considerable understanding of others’ needs and perspectives; tactful and diplomatic; able to deal with sensitive issues such as legacy giving or examples of different cultures</td>
<td>Essential</td>
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### PERSON SPECIFICATION

#### Experience

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<tr>
<td><strong>Demonstrable relevant experience managing a regular giving programme</strong></td>
<td>Desirable</td>
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<td>Experience of managing both financial and contact/relationship databases to store, retrieve and manipulate data</td>
<td>Desirable</td>
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<td>Experience of identifying and segmenting audiences via databases to increase levels of giving</td>
<td>Desirable</td>
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<td>Experience of producing clear and effective written communications</td>
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<td>Experience of administrative duties</td>
<td>Essential</td>
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<td>Experience of successful negotiation.</td>
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<td><strong>Budget monitoring - experience of managing and reporting on agreed budgets</strong></td>
<td>Essential</td>
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<td><strong>Proven experience of staff management: team-building skills, including leadership, motivation and developing a team.</strong></td>
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<td><strong>Experience of asking for, and closing donations</strong></td>
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#### Personal attributes

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<td><strong>Logical and rigorous, with strong attention to detail,</strong></td>
<td>Essential</td>
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<td><strong>Teamwork: Effective contribution to a team; working cooperatively with others</strong></td>
<td>Essential</td>
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<td><strong>Self motivation: Highly self-motivated; enthusiastic and positive; determined; able to make progress with complex issues involving multiple stakeholders; meets objectives on own initiative; committed to</strong></td>
<td>Essential</td>
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<td><strong>Creativity: Ability to innovate through new programmes and activities which meet the needs of specific audiences; able to take a professional, proactive and imaginative approach to problem solving</strong></td>
<td>Essential</td>
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<td><strong>Response to change: Investigative; adaptable; prepared; calm and proactive in all situations</strong></td>
<td>Essential</td>
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THE DEPARTMENT

The Department is located within the External Relations Directorate which includes the Offices of International Relations, Student Recruitment and Admissions, Strategic Marketing and Digital Communications, Centre for Lifelong Learning, Events and Public Engagement, Press and Media Relations. Colleagues work closely with Careers, the York Students’ Union and Academic Registry, amongst others, to deliver funding and volunteering programmes that support key objectives of the University.

Within the Office of Philanthropic Partnerships and Alumni responsibilities are divided across the five sections of

- Institutional Philanthropic Partnerships
- Individual Philanthropic Partnerships
- Participation Programmes
- Alumni and Donor Engagement
- Information and Philanthropy Services

Upholding transparency, professionalism, due care and diligence and good care of our supporters is of primary importance in all that we do.

The activities of the Department are overseen by a Senior Management Team (SMT).

OPPA works with alumni and friends of the University. We help them to deepen their ties with York and each other, and encourage them to support students, research and the University through gifts of time and money. OPPA works with academics across the University, the University board and donors to secure funding for innovative projects that tackle global challenges such as food sustainability, inequality and discrimination, and scholarships that open up a new world of opportunity for our global student community.

The University are in the initial stage of planning a fundraising campaign that allows us to shape and articulate our philanthropic ambition and belief. It encompasses priorities laid out in the University Plan, and takes into account the wider HE context and key strategic drivers for the University of York in relation to building our global reputation, providing the best possible student experience, and building our financial resilience.

It is anticipated that the Campaign will be framed around four themes, those of supporting:

- our students to stand out;
- our research community to push boundaries of knowledge and understanding;
- to be enterprising and innovative in our business engagement; and
THE DEPARTMENT

- to reimagine our campus - digitally and physically.

Our priorities are for gifts towards - capital development, research projects, enhancing the student experience, and scholarships.

Cash and pledged donations, as well as gifts of time, talent and expertise will be counted towards the Campaign total.

For further information, visit: https://www.york.ac.uk/
THE UNIVERSITY

Founded on principles of excellence, equality and opportunity for all, the University of York opened in 1963 with just 230 students. In 2017 it is the home of more than 17,000 students across more than 30 academic departments and research centres. Since opening over fifty years ago, we have become one of the world’s leading universities and a member of the prestigious Russell Group.

We are consistently recognised as one of the leading Higher Education Institutes and one of just six post-war universities which appear in the world top 100 (2013-14) and 15th in the Times & Sunday Times league table (2016). The University of York has won six Times Higher Education (THE) Awards and five Queen’s Anniversary Prizes.

The University is proud of its association with Athena SWAN, holding 12 awards in support of gender equality, representation and success for all, with gold awards for Chemistry and Biology and a University-wide bronze award.

Of 154 universities that took part in the Research Excellence Framework (REF) in 2014, The University of York ranked 14th overall and 10th for the impact of our research. The University is consistently in the top ten UK research universities and attracts over £60m a year of funding from research alone.

Our vision is to make the University of York a world leader in the creation of knowledge through fundamental and applied research, the sharing of knowledge by teaching students from varied backgrounds and the application of knowledge for the health, prosperity and well-being of people and society.
Attractive workplace

Centred around the picturesque village of Heslington on the edge of the city of York, our colleges are set in an attractive landscaped campus. York enjoys a safe, friendly atmosphere with facilities including bars, shops, theatres and concert halls all within easy walking distance.

The University has undergone an unprecedented period of expansion and renewal since 2000. We have invested in twenty new buildings on the original campus and have completed the first and second phases of a £750m campus expansion. Our investment in new colleges, teaching and learning spaces, laboratories, research facilities and a new sports village mean there has never been a better time to join us.

During this period of change we've worked hard to retain our friendly, informal and collegiate atmosphere, which is important to our core values of inclusivity and interdisciplinarity.

We have a thriving international community and are committed to providing staff moving to York with as much support as possible through our Relocation Package and Welcome Officers.

The University aims to offer a nurturing and supportive environment as an employer. Flexible working hours, nursery facilities, childcare vouchers, cycle to work scheme, generous holidays and an attractive pension scheme all make the University of York one of the region’s leading employers.

For further information please visit our employee benefit pages.
THE CITY AND THE REGION

The City of York

Internationally acclaimed for its rich heritage and historic architecture, York's bustling streets are filled with visitors from all over the world. Within its medieval walls you will find the iconic gothic Minster, Clifford's Tower and the Shambles - just a few of the many attractions.

But York isn't just a great place to visit - it's also a great place to live and work. While nourishing a vibrant cosmopolitan atmosphere, York still maintains the friendly sense of community unique to a small city.

Visit www.visityork.org for more information on the city of York.

Shopping, culture and entertainment

York boasts specialist and unique boutiques but also all the high street stores on its busy shopping streets. Alongside them you will find cinemas, theatres, an opera house, art galleries, a vast range of restaurants, live music venues and clubs. York is particularly renowned for its multitude of pubs and bars, from the modern to the medieval.

Housing and schools

Whether you choose to live close to the city, in one of the surrounding villages or further afield, you will find a wide range of housing within comfortable distance of York and the University. For families, the area has a range of excellent schools both in the state and independent sector.

Great location

York is one of Britain's best-connected cities. Halfway between London and Edinburgh on the East Coast mainline, on intercity trains you can reach London King's Cross in less than two hours and Edinburgh in two and a half hours. York is also well served by road links, and it is easily accessible from the A1, M1 and the M62.

For those travelling from overseas, Manchester Airport is two hours away and Heathrow Airport just three and a half. Flights from nearby Leeds Bradford Airport provide easy access to mainland Europe. By Eurostar from London St Pancras, Paris is just over six hours away.

Yorkshire

The Lonely Planet guide recently declared Yorkshire the third best region in the world to visit. There is something to cater to every taste, whether it be the rugged landscapes of the Moors or the Dales, the picturesque seaside towns of Scarborough and Robin Hoods Bay, the gothic architecture of Whitby or the vibrancy of cosmopolitan Leeds.
Apply online

- Go to https://jobs.york.ac.uk
- Find this job using reference
- Complete the online application form

You will need to submit your completed application by midnight (local UK time) on 20 November 2017

What will I need?

We will ask you for details of:

- your employment history
- relevant qualifications
- two referees

You need to be ready to show us how you meet the requirements of the job, either in a written statement and / or by answering questions.

Help and assistance

Direct any informal queries to susie.braithwaite@york.ac.uk

If you have any questions about your application, contact the HR Services team:

recruitment@york.ac.uk
+44 (0)1904 324835