**Fundraising Planning: New Post 2018**

**Eleanor Marsden (Trustee)** for

Gilbert White & the Oates Collections

**June 2018**

**Appointment of a Fundraising Manager**

**Job description suggested introduction:**

**Background:**

Gilbert White’s House and the Oates Collections, set in an idyllic Hampshire location, is recruiting for the new post of Fundraising Manager, to focus on increasing voluntary streams of income. This is an opportunity to undertake a key role for a unique, regional organisation within the heritage and conservation sectors, working alongside a committed team of staff, trustees and volunteers.

The museum attracts visitors from across the South, eager to learn about Gilbert, the man often known as the ‘father of ecology’, and Laurence and Frank Oates, explorers of the natural world. In line with our vision (summed up as ‘Explore. Inspire. Excite’), the museum recently completed a transformative project to update the interior and exterior landscapes of much of the space. This project, *Inspiring Journeys of Discovery in the Natural World,* raised £2.8m in project funds, largely funded by the HLF, but including over £800,000 in donations from trusts, statutory organisations, foundations and individuals. The museum is seeking a full-time Fundraising Manager to ensure long-term sustainability of income to the museum and to allow GWOC to fulfil the needs of its business plan in this exciting new phase of its development.

The Fundraising Manager will identify, research, cultivate, and steward potential funders and supporters to attract voluntary income and work to support the (voluntary role of) Volunteer Co-ordinator in stewarding the museum’s 150+ volunteers.

Funding will be required to supplement current income from admissions, venue hire, field studies visits, events, garden visits and retail. Funding required will be for restricted funds to support aspects of operations, as well as core cost support and occasional maintenance and capital funding in the future. Do date, much of the fundraising has been volunteer-led and we are keen to professionalise our fundraising going forwards.

**The Role:**

The Fundraising Manager will join GWOC at an exciting time of development as we celebrate the major redevelopment project and aim to build on this success to grow supporters. We will look to this position for leadership of a new fundraising department and appropriate strategy to deliver year-on-year growth in voluntary income.

We are looking for an experienced individual with a good track record in fundraising for charities, particularly in writing successful and engaging grant proposals from trusts and foundations, and of cultivating relationships with funding bodies and individuals. The post-holder will develop our relationship management database (Blackbaud eTapestry) to build and develop existing relationships, as well as identifying and cultivating new ones.

During the first 6 - 12 months, the successful candidate will be expected to establish him/herself in the role and develop a fundraising strategy whilst engaging internal and external relationships. Some early income generation will be looked for. After this period and as a result, a reasonable annual fundraising target for gifts and pledges will be proposed and agreed with the Co-Directors, who will line-manage the role.

The successful candidate be good at working with others to maximise their potential and have the ability to co-ordinate bids to support a variety of activities and projects across the organisation. Comfortable with budget management, highly organised, and with a strong attention to detail, they will be personable and engaging. They must be a self-starter with a desire to use creativity to benefit fundraising work and that of the whole museum. Previous experience in a heritage / museum / arts role is desirable, but not essential.

**Job description**

**Key duties within this position will include:**

* Develop and implement a clear and achievable fundraising strategy to generate restricted and unrestricted income and contribute to other agreed objectives;
* Shape and develop a variety of income streams, including regular giving, trusts and foundations, legacies and small appeals, corporate support and occasional fundraising events. Research and develop new fundraising streams where appropriate;
* Develop a case for support that meets the needs of various target audiences, in line with the organisation’s strategy and vision;
* Work alongside the Director and Trustees to build, develop and manage relationships with prospects and donors, including with high net worth individuals;
* Lead on prospect research (individuals, businesses and trusts and foundations) and prospect pipeline moves management;
* Build relationships with existing and pertinent (charity, Friends and corporate) partners to maximise joint fundraising potential;
* Prepare and present funding proposals for individual donors, corporate sponsors, trusts and foundations and work with Director and HLF Project Officer to assist with project grant applications and stewardship;
* Work with the Marketing Manager to create and fulfil a communications strategy (including social media and online) for fundraising;
* Play a role with the Directors and Marketing Manager to identify and develop appeals and create guidance documents and timelines, proposals and literature;
* Develop and assist in a strategy for involvement of Patrons and assist in volunteer stewardship where appropriate;
* Agree a reasonable annual fundraising target for gifts and pledges with the Directors;
* Check and process incoming donations;
* Lead on directing good data management, confidentiality and best practice for fundraising data, including re. the management, storage and updating of personal information;
* Attend weekly management meetings and present at meetings with Trustees as applicable;
* Manage a fundraising budget;
* Monitor and evaluate fundraising progress, engagement and successes;
* Prepare monthly progress reports for the Directors / Trustees as appropriate;
* Use IT tools effectively within the role.

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| **Person Specification** |
| **Essential** | **Desirable** |
| Qualifications: Bachelors’ Degree or equivalent experience | IoF Certificate or Postgraduate Diploma in Fundraising, CFRE, or relevant professional qualification |
| At least three years’ experience in a similar role | Attendance at relevant, recognised fundraising courses  |
| Solid knowledge of the variety of fundraising techniques and how to implement them |  |
| Team player, able to work effectively with small team of staff, volunteers and Trustees | Proven experience of cross-team working and liaising with multiple stakeholders   |
| Excellent written and verbal communication skills | Confident public speaker |
| Strong IT ability, including competence using MS Office and relational databases   | Familiarity with eTapestry, Raiser’s Edge, ThankQ or similar industry-specific database |
| High level of attention to detail   |  |
| Positive self-starter with an ability to manage and direct own workload  | Experience managing volunteers |
| Creative thinker, able to effect new and fresh projects and appeals in an engaging way | Experience of developing and implementing new donor engagement initiatives   |
| Solid knowledge and understanding of donor and prospect cultivation and management |  |
| Research experience in corporate or non-profit sectors | Familiarity with prospect research methods |
| Ability to build solid, lasting relationships with donors and stakeholders |  |
| Understanding of the workings of Gift Aid and Tax-Efficient Giving |  |
| Ability to write structured, persuasive trust and foundation applications and reports | Experience writing analytical reports |
| Good project management skills  |  |
| High level of tact and discretion |  |
| Comfort prioritising a busy workload |  |
| Working knowledge of the new Fundraising Code of Conduct, charity governance, changes to fundraising regulation and GDPR/PECR | Attendance at formal or informal training on data management  |
| Demonstrable interest in heritage and ecology / travel and exploration.  | Associated qualifications or evidence of interests. |
| Able and willing to work outside normal office hours as required, including some evenings and weekends |  |