**Job description**

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| **Job title:** | Individual Giving and Major Gifts Fundraising Manager |
| **Department:** | Fundraising and Communications | **Contract:** | Permanent |
| **Reporting To:** | Head of Fundraising and Communications | **Hours per week:** | 37 |

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| **1. Job purpose** To develop and drive York Museums Trust Individual Giving Strategy, contributing to YMT Fundraising Strategy. To establish and steward relationships with current supporters and prospective high value givers, securing growing and sustainable income for the organisation and a successful pipeline that converts mid to high level givers to Major Donors. To manage and build our growing supporters network, cultivating exciting relationships and prospecting for new high impact connections. |

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| **2. Dimensions****Line Management*** Individual Giving Assistant

**Budgets*** Manages budgets ca £50k

**Role Impact*** Portfolio management - develop and account manage a portfolio of up to 100 potential major donors and/or supporters, ensuring excellent relationship management and increasing unrestricted income from individuals to over £120k;
* Develop, implement and manage philanthropic regular giving via patrons scheme, legacy scheme and visitor giving options at all YMT attractions onsite and online;
* Develop and manage new supporter opportunities ensuring a smooth transition of ca 20,000 existing YMT Card members, providing supporter engagement and yielding ca £300k in unrestricted income per annum
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| **3. Principal accountabilities****Core Responsibilities** Responsible for developing and implementing the Individual Giving strategy feeding into the 5-year Fundraising Strategy, incorporating a relationship management plan, which will focus on both acquisition and retention of donors making financial gifts to maximise income for all projects including contributing to major capital development. To cultivate relationships with current and potential supporters by representing York Museums Trust at networking events including breakfast and evening events which may include occasional weekends.Deliver against annual objectives and KPI’s, providing financial reports to ensure that the Head of Fundraising and Communications receives appropriate information in an accurate and timely manner. Monitor and control budget expenditure to ensure effective cost control within budget parameters.To keep up to date with charity law and fundraising practice, ensuring that fundraising undertaken by YMT is done so legally, safely, ethically and respectfully.To work collaboratively with the Grants and Sponsorship Fundraising Manager alongside colleagues to develop strong proposals and compelling ‘Cases for Support’ which articulate priority work with identified timescales and budgets. Maintain strong relationships with colleagues including the Communications, Finance, and Curatorial teams and the VE Managers to ensure effective working. Ensure that all communication with existing and potential supporters is documented and accurately recorded on the CRM system and compliant with the relevant data protection regulations.**Supporter Opportunities**Manage and develop new supporter opportunities ensuring a smooth transition of existing YMT card members into the new supporter offers available to raise c. £300k per year of unrestricted income.**Relationship Management** Manage and coordinate fundraising activities and events, ensuring relationships with supporters maintain the highest standard of supporter engagement and care as part of a positive and successful supporter journey.Manage events including private views and dinners, providing detailed briefing notes on current and potential supporters to key colleagues in advance.Making and working closely and supporting the SLT and Trustees in making high-level asksMaintain and update supporter engagement activity on the CRM system to ensure excellent stewardship that is compliant with the relevant data protection legislation.Develop, enhance and sustain excellent relationships with key stakeholders, including the Friends of York Art Gallery and the Yorkshire Philosophical Society.**Individual giving, major donors and legacies**Develop, implement and manage philanthropic giving in the form of a regular giving scheme and a patron’s scheme to yield over £120k.Develop, implement and manage a legacy scheme.Ensure the development of individual giving and visitor giving, maximising the use of the CRM system.**CPD**Maintain a good awareness of sector trends and ensure up-to-date knowledge of best practice and emerging opportunities in fundraising.Ensure an active CPD programme is maintained personally and for the Individual Giving Assistant.**Other duties**To work across teams in a collaborative manner and to proactively engage with colleagues on projects and initiatives as needed.Promote and develop equality and diversity in line with YMT Equality Statement.Other duties may be required from time to time which are consistent with the grading of this post. |

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| **4. Key performance measures*** Manage the transition of c.20,000 YMT Card members into new supporter opportunities, providing excellent supporter engagement yielding ca. £300k of unrestricted income per year
* Develop and account manage a portfolio of up to 100 potential major donors and/or supporters increasing unrestricted income from individuals to ca £120k per year
* Implement a successful patrons scheme (over 30 per year)
* Implement a successful legacy scheme (10 per year)
* Ensuring expenditure budgets are adhered to
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| **5. Knowledge, skills, experience and behaviours****Knowledge*** Educated to degree level or equivalent relevant professional experience with excellent knowledge of the subject (Diploma in Fundraising is preferred)
* A full member (MInstF) of the Institute of Fundraising
* Excellent understanding of tax efficiencies relating to significant donations from individuals
* Robust working knowledge of relevant data protection legislation
* Knowledge and understanding of fundraising, including legal implications, in the heritage and cultural sector

**Skills*** Excellent interpersonal skills and the ability to communicate appropriately with a wide variety of people including senior contacts and donors, both written and verbally, as well as proven ability to “make the ask”
* Ability to build and sustain effective relationships, engage with and influence a wide range of people internally and externally
* Ability to work across teams in a collaborative manner
* Strong organisational skills and the ability to manage multiple deadlines and associated pressure demands
* Experienced at using MS Office packages as well as CRM systems
* Meticulous attention to detail and accuracy, particularly when inputting data
* Problem solving and planning skills
* YMT has a strategic commitment to increasing its digital skill base. The post holder should be able to demonstrate competence in one or more of the following areas:
	+ Digital recording – e.g. photography, sound, video
	+ Social networking – e.g. twitter, Facebook

**Experience*** Significant experience in individual giving and relationship management
* Demonstrable track record of securing significant gifts from individuals (above £60K. Above 100K is desirable)
* Significant demonstrable experience of developing and managing legacy schemes
* A proven track record of setting up an approach to individual giving and embedding it across organisations in relevant sectors
* Proven success in delivering direct and digital campaigns across a range of streams including regular giving and appeals and excelling in budget management, reporting and tracking performance
* Experience of working in a target driven environment with multiple focusses
* Experience of line management

**Behaviours*** Demonstrates enthusiasm for fundraising, heritage and the work of YMT
* Uses discretion when working with confidential information
* Works flexibly and collaboratively as part of a team
* Commitment to equality and diversity and an understanding of how this commitment applies to this role
* Willingness and ability to adapt to new trends and technology
* Committed to Continuous Professional Development for self and colleagues
* Commitment to and advocacy of equality, diversity, inclusion and anti-racism and understanding how these apply to the role.
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| **6. Key relationships**Senior Leadership TeamWider Management TeamSenior CuratorsMuseum and Gallery ManagersCommunications TeamTrusteesMajor donors, patrons and supportersYorkshire Philosophical Society and Friends of York Art GalleryExternal contacts and stakeholders |

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| **7. Organisation chart** |

**Terms and conditions of service**

Job Title

Individual Giving and Major Gifts Fundraising Manager

Reporting line

This post reports to the Head of Fundraising and Communications

Salary

The salary range for the post is £30,956 - £37,530 (YMT Scale Points 32-39)

Probationary period

Appointments are subject to the successful completion of a six-month probationary period.

Health

Prospective employees must be cleared by the Occupational Health Service as medically fit for employment by the Trust.

Annual leave

The annual leave entitlement is 25 days per annum, increasing by five days after five years continuous service with the Trust, plus public holidays.

Pension

The Trust belongs to the Local Government Pension Scheme and all new employees are enrolled. It is possible to opt out of the pension using forms available at [www.nypf.org.uk](http://www.nypf.org.uk).

Hours of work

The hours of work are 37 hours per week, worked over five days.

Period of notice

The period of written notice required for you to terminate this post is two months. The Trust will give you two months’ notice.