



# Bank Workers Charity

Supporting the health and wellbeing of the banking community

## Individual Giving Manager – Corporate Engagement and Fundraising team

### Applicant Information Pack

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## Introduction

Thank you for your interest in joining the Bank Workers Charity.

We're committed to transforming the wellbeing of the banking community - past and present bank workers, retirees and their families. We do this by providing financial support, advice and information and by working closely with banks to promote the wellbeing of their staff.

We've been here for the banking community for over 140 years but with the growing demand for our support means we are needed now more than ever.

Over the last year we helped more clients than ever before with vital financial support, life-changing guidance and practical assistance. Our new strategy is one of supporting those most in need, while increasing our fundraising efforts.

The Individual Giving Manager will be key in the delivery of our fundraising plans, helping drive individual income growth of circa £200k per annum by 2027. This new role will be instrumental in helping us grow our fundraising streams in order to meet the growing need for our support.

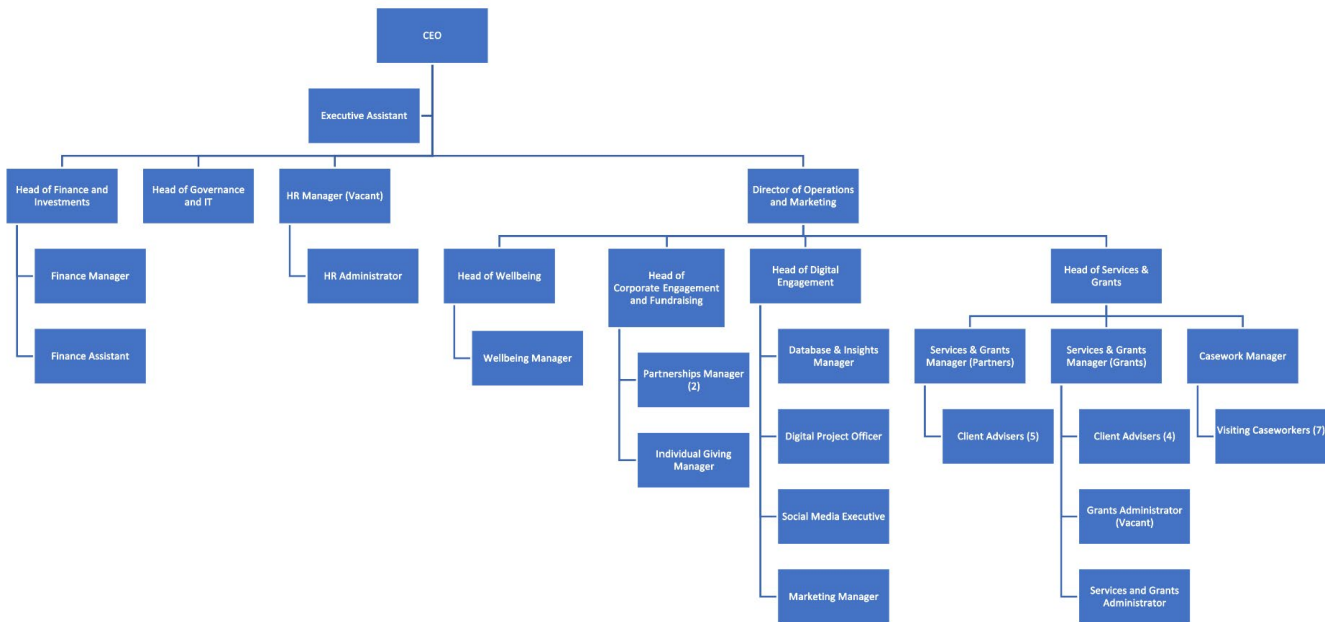
Our success can only be achieved through the talent of the people who work in our team. We want to lead by example in supporting the wellbeing of our staff. We have a generous package of support for staff and put wellbeing and resilience at the heart of how we support our team.

We believe that through focus, innovation and working with the UK's banks and key partners, we can transform the lives of the people we support. We are focused on providing high impact solutions that meet the needs of our beneficiaries, and we need great people to help us achieve this.

### **Anna McGinnes**

Head of Corporate Engagement and Fundraising

# Organisational structure



## Our values and behaviours

Bank Workers Charity's organisational values are **Integrity, Caring, Respect, Fairness and Achievement**.

Living these values applies to all employees and we value the services and relationships of those who share similar values, such as suppliers and partners. The values will be referenced in particular when recruiting new staff and in staff performance reviews. Detailed below is a set of behaviours which link with and reflect our values.

Our values and what they mean				
INTEGRITY	CARING	RESPECT	ACHIEVEMENT	FAIRNESS
<b>Our clients sit at the heart of everything we do.</b>	<b>We care about our colleagues and making a difference in the lives of the people we help.</b>	<b>We respect the people we work with, and the people we work for.</b>	<b>We take pride in what we do and work to get the best outcomes.</b>	<b>We treat people fairly and as individuals.</b>
How we show our values				
We are professional, accountable and follow through on our commitments.	We make the effort to understand our clients' needs.	We empower our clients to make choices in order that they can improve their situation.	We are focused on quality and pay attention to getting things right.	We give each other timely and constructive feedback.
We put the shared interests of the Charity ahead of those of any individual or team.	We do our utmost to help our clients get where they need to be.	We treat people with dignity and respect.	We are innovative and creative; we push to find better ways of doing things.	We work to make everyone feel safe and encouraged to participate.
We are honest and ethical and build trust with our clients, partners and colleagues.	We build strong trusting relationships with the people we work with.	We don't just talk, we work hard to listen, understand and to be understood.	We proactively and willingly collaborate to share ideas and get the best results.	We embrace diversity and seek to be inclusive.
We are proud of our Charity and protect its good reputation.	We care about the wellbeing of ourselves and others, and speak up when things aren't right.	We communicate with clients, partners and colleagues in a clear and transparent way.	We are not afraid to try new things and to learn from our mistakes.	We aim to ensure everyone gets what they need - whether they're clients, partners or colleagues.
We support our colleagues to have the courage to speak out against inappropriate behaviour.	We work well with our colleagues as one team.	We challenge others respectfully and are prepared to be challenged.	We strive to exceed expectations of clients, partners and colleagues.	We say what we mean and we do what we say.
We collaborate and communicate openly and honestly.	We recognise the need for development of individuals and teams so that we can deliver great work.	We respect the beliefs and values of others, even if we don't share them.	We are custodians of the Charity and ensure the legacy of BWC is safe.	We seek to attract and retain the best colleagues.
We are determined to do the right thing and are committed to deliver the right outcomes.	We care about the quality and timeliness of the work we deliver.	We respect the environment we work in and do our utmost to make it a great place to be.	We are self-motivated, flexible, adaptable and embrace change.	We give credit where it's due and reward our colleagues fairly.

## Job description

### ***Individual Giving Manager – Corporate Engagement and Fundraising team***

**Responsible to:** *Head of Corporate Engagement and Fundraising*

**Responsible for:** *No direct reports*

**Key purpose:**

This role will lead on the strategy, planning and delivery of our Individual Giving programme including website donations, payroll giving and legacies.

You will be an important member of the Corporate Engagement and Fundraising team, supporting the Head of the team, and contributing towards our plan to drive individual income growth of circa £200k per annum by 2027.

**Principal accountabilities:**

- Developing and implementing individual giving plans, employing a range of retention and acquisition techniques aimed at increased giving and donor lifetime value
- Developing and implementing a legacy giving programme, as part of the individual giving strategy
- Leading the creative process as evidenced by working with communications colleagues to produce compelling digital and printed fundraising materials
- Providing excellent stewardship to all supporters who engage with individual giving and legacy activities
- Working with stakeholders to ensure customer journeys are insight-led and respond to audience need
- Working closely with the Partnerships Managers, to maximise opportunities for individual and legacy income among our bank workers and pensioner audiences
- Working with other key teams across Bank Workers Charity such as Services and Grants, Digital and Finance, ensuring a coordinated approach to donor communications and interactions
- Ensuring all fundraising activities comply with legal and statutory requirements, best practice, organisational policies around data protection, branding and financial procedures
- Maintaining an awareness of fundraising trends and best practice as evidenced by responding to any legislation or regulatory requirement in the UK to continuously improve our income generating approaches
- Managing relevant fundraising platforms, ensuring all funding records are updated and can be used effectively. Reviewing existing platforms and, if needed, introducing new solutions to improve value for money and donor experience
- Regularly assess and evaluate the performance of fundraising activities against agreed financial and non-financial objectives
- Working with the Database and Insights Manager and the wider Digital Team to ensure that data is captured accurately
- Report regularly on progress against income targets, ensuring KPI's are monitored. Taking action to optimise expenditure and drive income to meet organisational objectives
- Fully understand Bank Workers Charity' support services on offer and maintain a current knowledge of wellbeing issues within the banking sector

## Person Specification

<b>Experience &amp; Knowledge</b>	
<b>Method of Assessment:</b> Application & References	
<b>Essential requirement</b>	<b>Desirable requirement</b>
<p>Demonstrable experience of meeting six-figure income targets within individual and/or legacy fundraising</p> <p>Substantial experience of designing and delivering engaging fundraising campaigns and donor communications</p> <p>Knowledge of individual giving and legacy fundraising principles and best practice</p> <p>Working knowledge of fundraising platforms such as CAF Donate, Stripe and iRaiser</p>	<p>Experience of the financial services sector</p> <p>Experience of budget planning and forecasting</p> <p>Experience of developing and implementing individual giving and legacy strategies</p> <p>Experience of working with a CRM marketing database</p>
<b>Skills &amp; Abilities</b>	
<b>Method of Assessment:</b> Application, Interview & Tests, if applicable	
<b>Essential requirement</b>	<b>Desirable requirement</b>
<p>Proven ability to produce compelling digital and printed fundraising materials</p> <p>Strong communication, report-writing, analytical and evaluation skills</p> <p>Organised, proactive with the ability to multi-task</p> <p>Ability to interpret and understand newly presented information quickly and effectively</p>	<p>Ability to work in cross-functional teams</p> <p>Innovative problem solving</p>
<b>Personal Qualities / Competencies</b>	
<b>Method of Assessment:</b> Application, Interview, References & Tests, if applicable	
<b>Essential requirement</b>	<b>Desirable requirement</b>
<p>Passionate about making a sustainable, positive change in the wellbeing of people</p> <p>Strong customer focus</p> <p>Driven to meet targets and deadlines, with ability prioritise across several workstreams to work under pressure and keep to deadlines, whilst maintaining a positive outlook</p> <p>Approachable, uses initiative, team player, high attention to detail.</p>	<p>Adaptable to changing circumstances and accepts new ideas and initiatives</p>

## Terms and conditions

### Individual Giving Manager

**Starting Salary £45,000 per annum**

**Location:** Central London based with hybrid working (minimum two days a week office based)

### What we offer

- 30 days holiday, plus public holidays
- 8% employer contribution to Bank Workers Charity's pension scheme and up to 3% matched with employee contributions
- A wide range of employer funded wellbeing experiences through Heka
- Flexible benefit provision (including Medicash plan, cycle to work, payroll giving, retail discounts and electric car scheme)
- Group Life Cover (three times annual salary)
- Weekly wellbeing half hour
- Season Ticket Loan (upon successful completion of probation)
- Employee Assistance Programme

For more information about the Bank Workers Charity, please visit [www.bwcharity.org.uk](http://www.bwcharity.org.uk)

Bank Workers Charity is committed to supporting diversity and inclusion and welcomes applications from all backgrounds and communities.

