



Individual Giving Lead Job pack

Thanks for your interest in working at Citizens Advice Bucks. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Overview of Citizens Advice Bucks
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Anna by contacting anna.day@cabucks.org.uk

About Citizens Advice Bucks:

As of April 2021, Citizens Advice Chiltern, Aylesbury Vale and High Wycombe came together to form Citizens Advice Bucks, an independent and volunteer-based charity which provides a free and accessible advice and information service to clients across Buckinghamshire.

We can all face problems that seem complicated or intimidating. At Citizens Advice Bucks we believe no one should have to face these problems without good quality, free, independent advice. That's why we're here: to give people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.

You will be joining a supportive team of over 50 staff and around 80 volunteers all determined to do our best for our clients. Our core values are that we are client-centred, friendly, kind, professional and that we respect our clients, ourselves and each other.

Citizens Advice Bucks is an equal opportunities employer. We actively celebrate diversity, promote equality and challenge discrimination. We encourage and welcome applications from suitably skilled candidates from all backgrounds.



The role

Citizens Advice Bucks is a county wide charity which has secured a range of trusts and foundation funding and has started laying the foundations for individual giving.

You'll be an experienced Fundraiser with good knowledge of direct marketing, experience of seizing opportunities to develop products which would include 'in celebration', 'in memoriam' and legacy giving, and nurturing audiences and relationships using a range of channels including digital, print and telemarketing. You will have experience of supporting and engaging volunteers to conduct individual giving campaigns and inspire a new generation of donors to give to Citizens Advice Bucks. You must be hands on, love going out and meeting people, and getting to know our local communities and businesses, in person arranging and attending events. You will be at the heart of the new strategy for individual giving.

This role would best suit someone who loves to get out and about and, make the ask for funds, and is not shy about organising socials and events that help us develop community knowledge of our charity, whilst raising funds for a great cause and getting out in front of future donors, as well as managing a programme of information stalls at key community events throughout the year.



Role Profile

Purpose of the role

- To develop and deliver individual giving annual plans, manage budgets and work with Citizens Advice Bucks internal teams, external suppliers and agency partners.
- To develop and lead individual fundraising projects designed to meet Citizens Advice Bucks' targets through direct marketing campaigns to acquire new supporters and to retain and increase value from existing supporters and to monitor performance and make recommendations to enhance results.

Key responsibilities and tasks

1. Regularly develop and visit local community organisations, businesses, hospitality, golf clubs, religious establishments, and others to develop a wide-ranging series of relationships to develop individual giving cultivation events, working closely with

the Head of Development and Communications, trustees and volunteers to manage a programme of engagements.

2. Play a role in planning volunteer led community events that raise our profile and engage supporters, typically aimed at garnering and developing wealthy connections for the charity, or low to mid-level regular donors.
3. Initiate, develop and lead projects across the recruitment and retention programmes across a range of media. Channels will include telemarketing, print (supporter magazine, cash appeals, and retention mailings), paid social media, Display, YouTube, email and PPC.
4. Work with other members of the fundraising and communications team to develop a supporter journey, providing supporters with the best possible experience of Citizens Advice Bucks.
5. Manage the creative process for each project, working closely with Communications team to ensure that the content of all output and materials (verbal and written) reflect Citizens Advice Bucks work, brand and priorities. Work with the CRM database to ensure that data processes are effective and direct marketing campaigns are shaped as a result of rigorous testing and learning in line with agreed strategy.
6. Keep abreast of marketing trends, legal and regulatory requirements of fundraising and direct marketing in order to create engaging and cost-effective fundraising communications that meet the relevant regulations.
7. Ensure that the projects meet overall direct marketing strategy objectives, liaising with the Head of Development and Communications contribute to a quarterly monitoring report on fundraising performance, including analysis of results and using supporter insight.
8. Manage project expenditure to obtain best value for money and in accordance with Citizens Advice Bucks' financial policies and procedures.
9. Work closely with all internal stakeholders to identify supporter recruitment and retention opportunities within volunteering and community development, develop testing programmes and roll out where investment returns, and potential future value is sufficiently high.
10. Relationship management of and collaboration with external fundraising partners and suppliers to agree all aspects of the fundraising activity providing accurate briefs, ensuring that all copy is proof-read and signed off appropriately, and that all communications accurately reflect Citizens Advice Bucks brand and values.

11. Stay up to date with Citizens Advice Bucks' campaigns and wider work towards a positive relationship with Citizens Advice and the Public and keep abreast of competitor activity and developments in the charity sector.
12. Support the aims and principles of the Citizens Advice service and its equity and diversity policies
13. Perform any other tasks commensurate with the role, as directed by a Senior Manager.

Person specification

Essential:

1. A proven track record and experience of fundraising from individuals, particularly giving face to face presentations, nurturing community relationships and working with donors and volunteers to develop individual giving campaigns – with a track record of raising £100,000 per annum or more from individual giving, donations and events.
2. Experience of leading campaigns across a range of channels, such as social media, email, inserts, direct mail, Pay Per Click, YouTube, and telemarketing.
3. Experience of using CRM databases to drive effective direct marketing activity.
4. Good level of organisational, time management and project management skills.
5. Proactive, out-going personality who works well under pressure and is ideas led.
6. Knowledge of relevant compliance including Fundraising Code of Practice, CAP code, fundraising regulatory framework and complaints handling requirements in relation to individual giving.
7. A good understanding of the charity fundraising sector, and the latest trends and techniques in direct marketing.
8. A track record of engaging audiences, with an ability to produce compelling copy and content for online, email and social media and other channels.
9. Ability to demonstrate understanding and support the aims and principles of the Citizens Advice Service and our equity and diversity policies

10. Candidates must: hold a driving licence and have use of their own car. Be able and willing to travel over the whole of Buckinghamshire (or if part time, within an hour's radius of home if Buckinghamshire based, if not, then to cover either North or South of the County).
11. Be willing to work evenings and weekends for events, when needed, as a regular requirement.

Desirable

12. Experience developing digital fundraising tactics and plans, and experience using a range of offline channels and digital tools to engage and inspire supporters.
13. Experience of using Office 365 and along with understanding of content management systems and email authoring platforms.
14. Experience of managing budgets, monitoring results, and financial planning.
15. Experience of giving fundraising presentations and outward-bound relationships as an ambassador for a charity.



Terms and conditions

Accountable to: Head of Communications and Development

Salary: £30,000 per annum FTE

Working hours: Full time at 37 hours per week or two part time positions in a job share, candidates do not need to find their job share partner.

Responsible for: Volunteer

Contract: Permanent

Office base: Any of our Bucks offices- Buckingham, Chesham, Aylesbury, or High Wycombe, plus hybrid homeworking. Must be able to travel across whole County.

Closing date: Assessment and interview dates will be arranged as applications are received, and we reserve the right to close the role early if the right candidate is found.



What we give our staff

- **Employer Pension Contribution.**

- A company that is committed to its employees, valuing their knowledge, creativity and flexibility.
- Ongoing personal training and development.
- The chance to work with amazing people and a nationally recognised 5 charity.
- 25 days leave (plus statutory bank holidays) pro rata per year
- Contractual Sick Pay policy (Once probation period is passed)
- Travel expenses paid when working away from your “base office”.

How to apply

Please send your CV and a covering letter detailing your experience using the Person Specification to admin@cabucks.org.uk