

## Part 1: JOB DESCRIPTION

**JOB TITLE: Senior Philanthropy Manager**

**DEPARTMENT: Income**

**TEAM: Business Development**

**LOCATION: Linked to Ewell (Surrey) with flexible working options. Some occasional travel required.**

The Philanthropy programme at the Samaritans is fledgling with a small portfolio of active potential supporters and donors. Annual income is around £400k pa. with donations typically at 5 figure values. There is much potential to grow the programme and some useful groundwork and systems have been put in place. Growing public awareness of suicide plus the increase in wealth and philanthropy nationally makes this a good moment.

The ambition is initially to solidify the programme and it is anticipated some quick-wins will ensure target is met in 2024-25, this first year will be about proactive engagement with a wide range of potential supporters, developing programme infrastructure and securing mid-value donations to build the pipeline from the ground up. In year two the ambition for the programme will increase, the working goal will be to sustainably raise £500k pa by driving up gift volume and value. In time the programme likely has further potential and in two years time the Samaritans would want to be in a strong position to understand and realise this.

The requirement of the post-holder is to work with momentum to develop the programme building on early success to enable us, in time, to grow the programme to its full potential. The post-holder will be the charity expert in philanthropy bringing knowledge and skill to the fundraising programme with this specialism.

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### **1. POSITION IN ORGANISATION**

- Reports into: Assistant Director (AD) of Business Development
- Line Manages: Philanthropy Officer
- Contacts which the post holder has within and outside the organisation: Income, operations, external affairs teams within Samaritans. Branches. Donors, prospects and influencers.

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### **2. MAIN PURPOSE OF JOB**

Leads the development and implementation of Samaritans Philanthropy programme including gifts at Mid-value (£1-5k) and Major Gift level (£5k+) in order to raise significant levels of income to support Samaritans vision that fewer people die by suicide.

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### **3. KEY RESPONSIBILITIES**

#### **Strategy and leadership**

- Provides strategic and operational leadership to Samaritans' Philanthropy programme – to enable step change, then continued growth and sustainability.
- Manages a clear set of key performance indicators that ensures growth of the programme
- Develops yearly operational plans needed to achieve annual income targets
- Working with the AD for Business development in setting, monitoring & reporting on annual income and expenditure targets. This includes forecast and pledged income.
- Leads on all Major Donor acquisition, cultivation and stewardship programmes, working where required directly with Samaritans Senior Leadership Group and Income Heads of Teams
- Works closely with other Income functions to ensure an integrated approach and involvement in keys projects or campaigns
- Identifies risks for the charity, mitigates these proactively and transparently.

- Scan the horizon and external landscape for opportunities – through wealth advisors, in young wealth and regional wealth and convert these opportunities into strategy and plans.

### **Management of the Philanthropy Programme**

- Provides line management, guidance and support to the Philanthropy Officer, including identification of learning & development opportunities, within the framework of the annual performance review.
- As required manages agencies and consultants in pursuit of the aims of the programme eg. wealth screening
- Responsible for team ways of working and works collaboratively with team members and AD for Business Development to ensure integrations with wider the income team
- As a senior fundraiser manages own time effectively and to greatest advantage
- Develop and refine prospect identification and research process and techniques
- Leads on the development of infrastructure to support the programme – ways of working with other teams, processes and policy development
- Champions and owns the donor experience and uses insight for continuous improvement of donor journeys, creating advocates in the process

### **Front-line fundraising**

- Manages their own pipeline of prospective supporters actively identifying, cultivating and soliciting donations
- Leads on and maintains effective relationship management of key donors for the charity, both directly and indirectly
- Eloquent communicates the complexity of suicide prevention and Samaritans services inspiring urgency and support at the highest level
- Develops proposals aligned to Samaritans vision and donor interest ensuring that funding proposals and reports are of the highest standard

### **Event Management**

- Ensures the successful development and end to end execution of an events programme for cultivation and fundraising purposes as part of a coherent charity event calendar
- Uses other events and activities across the charity and the external environment to support major donor objectives and networks

### **Research & Compliance**

- Use appropriate research and network mapping sensitively and intelligently – supporting major donor pipeline and wider organisational income objectives and project
- Ensure all data and record keeping activity follows fundraising best practice and meets legal requirements law – including GDPR legislation

### **General Duties of a Samaritans' Staff Member**

- Contribute to the effective and efficient running of the Central Office as appropriate.
- Participate, as appropriate, in staff forums and meetings.
- Adhere to Samaritans' policies and procedures.
- Represent the Central Office appropriately across the organisation and Samaritans to the wider community as appropriate.
- Treat all colleagues, volunteers and members of the public with dignity and work within and adhere to Samaritans' equal opportunities statement and policies.
- Carry out reasonable requests made that are within the broad remit of the role
- Carry out any duties that may be reasonably required by the Executive Director of Income or AD of Business Development.

## **4. SKILLS, KNOWLEDGE AND EXPERIENCE**

### **Essential skills**

- Substantial experience of fundraising with a strong track record in major gift fundraising
  - Experience of personally soliciting gifts of 5 and 6 figures from major donors
  - Experience of successfully managing the major donor process end to end leading to gifts of 6 figures and upward
  - Experience of leading, managing or working with Mid-value programmes
  - Proven track record and experience of building, developing and managing key relationships at the highest level
  - Experience of strategic planning, budgetary control, and working to financial targets.
  - Good leaderships skills with a track record of developing others and establishing team tempo and culture
  - Capable of understanding and implementing wider or associated organisational strategies and translating into the major donors space
  - Sound knowledge and experience of fundraising databases
  - Experience of moves management techniques and portfolio segmentation
  - Ability to manage a range of stakeholders at all levels of seniority, both internally and externally
  - Highly sophisticated communications skills, verbal and written, able to engage donors with our case for support, build rapport easily, read subtlety and nuance
  - Excellent planning, prioritisation and organisational skills, able to design and execute strategies to maximise the potential of our donors
  - Ability and resilience to work independently and capable of successfully interpreting ambiguity
  - Strong commitment to personal development, ambitious for themselves and for Samaritans
  - Experience of analysing and reporting on fundraising performance
  - Understanding of charity and data protection legislation as it applies to fundraising, particularly tax efficient giving
  - Understanding of voluntary sector organisations, including working with Trustees and volunteers.
  - Experience of successfully using digital fundraising techniques in the context of major donors
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## **5. PERSONAL ATTRIBUTES**

- Willingness to try new approaches, experiment and encourage others to do the same.
  - A calm and confident manner.
  - Able to work energetically and drive the programme forward at pace balancing speed with careful thought and care.
  - A high degree of accuracy and attention to detail.
  - A positive, problem solving approach to obstacles.
  - Flexible approach to work, willingness to travel and weekend working.
  - The ability to understand and to work effectively within the special nature of the Samaritans volunteer environment.
  - Commitment to inclusiveness and diversity and its relevance to Samaritans work.
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