



**Community  
Foundation**  
for Surrey

Together we can

## **Development Officer**

JOB DESCRIPTION  
&  
PERSON SPECIFICATION

October 2020

## CONDITIONS OF EMPLOYMENT

JOB TITLE:	Development Officer
HOURS:	Part-time 22.5 hours / week with flexible working
SALARY:	£22,000 - £25,000 (dependent on experience) per annum pro rata
PENSION	The Foundation has an automatic enrolment workplace pension scheme with NEST and will pay, on behalf of the employee, 6% of the basic annual salary (in addition to the basic annual salary).
HOLIDAYS:	25 days holiday per annum, in addition to public holidays pro rata. An additional days leave is awarded for every 3 years' of continuous service up to an agreed maximum of 30 days leave. Staff may also take an additional 2 days leave to undertake voluntary work for a charitable cause, at the discretion of the Chief Executive.
LOCATION:	The post-holder will be based at the Foundation's office, which will shortly be moving to Central Woking.
TRANSPORT:	Car mileage allowance for travel in connection with work
PROBATIONARY PERIOD:	6 Months
ACCOUNTABILITY:	Reports to the Director of Philanthropy, with ultimate responsibility to the Chief Executive and to the Chair and Board of Trustees.

## JOB PURPOSE

This newly created role will play a key part in supporting the Community Foundation to successfully achieve its ambitions for further growth in philanthropy in the county of Surrey.

The Development Officer will have a critical role in the research, identification and prioritisation of new prospective donors, as well as being responsible for managing important data and inputting into all aspects of the mission to build a strong movement of local philanthropists.

## ROLE OVERVIEW

The key areas of responsibility include:

- Research** – Pro-actively carrying out research to identify new Donors (including individuals, families, corporates, trusts and foundations), as well as influencers and introducers to enable us to grow our pool of prospects.
- Data management** – Manage prospect and donor data, logging and tracking campaigns and activities, and generating segmented data selections.
- Proposals and Reports** – Drafting high quality proposals and reports in order to increase giving.
- Development support** – The provision of appropriate support in the development of philanthropy, such as managing the process of distributing invitations and tracking responses for a range of events held by the Foundation.

The job description and priorities will be reviewed at least annually.

## KEY RESPONSIBILITIES

The specific responsibilities of the Development Officer include:

### Research

- Using a broad spectrum of resources research and identify suitable prospects, gathering information such as financial capacity, ability to give, willingness to give, charitable interests and potential connections to Surrey. Prospects will include high net worth Individuals, families and corporates.
- Proactively identify new sources of potential prospects by liaising directly with Community Foundation for Surrey's wider team of Trustees, Ambassadors and Advisors.
- Produce in-depth well-written reports and prospect briefings based on this research, for the use of the Director of Philanthropy and CEO.

### Data management

- Using our CRM system (Salesforce), ensure all donor data is up to date and accurate.
- Generate segmented data selections for targeted communications, in line with the donor development plan.
- Produce complex queries and reports as required by the Director of Philanthropy.

### Proposals and Reports

- Create bespoke, engaging proposals designed to encourage prospects to support us, as directed by the Director of Philanthropy.
- Develop and maintain a schedule of donor reporting requirements, sharing regularly with relevant colleagues to ensure awareness of timescales for required information.
- Draft well-structured and informative reports for donors which show the impact of their support. Source relevant information for reports by liaising with colleagues.

### Development support

- Work closely alongside the Marketing & Communications Officer to manage the invitation process for a range of donor engagement, prospect and cultivation events including preparing mailing lists, tracking responses and accurately recording related activity on Salesforce.
- Work with the Marketing & Communications Officer in the delivery of events 'on the day' including set up, guest registration and pack down.
- Other administrative support, such as assisting with letters, meeting notes and donation information as required.

### Values

The postholder will conduct work in a manner consistent with the Foundation's values:

- ✓ **Ambitious**  
We focus our energy on building significant, sustainable funds for local communities.
- ✓ **Professional**  
We work with integrity, transparency and efficiency.
- ✓ **Supportive**  
We are an approachable and supportive grant-funder, with a heart firmly rooted in our community.
- ✓ **Empowering**  
We collaborate with local donors and local voluntary groups to enable positive and sustainable change to be achieved.
- ✓ **Pro-active**  
We take a positive and creative approach, using our knowledge to realise the power of local philanthropy.

## PERSON SPECIFICATION – Development Officer

### Education and Qualifications

- Good general education;
- Fully computer literate and confident using IT.

### Experience – Essential

- Highly proficient user of complex CRM databases, preferably Salesforce, ideally within a charity setting;
- Experience of producing data selections involving segmenting and targeting;
- Experience of carrying out prospect research;
- Demonstrable experience of providing bespoke reports and analysis for internal stakeholders;
- Experience of writing copy for a range of document types for a range of audiences.

### Experience – Desirable

- Knowledge and experience of working within the voluntary sector;
- Knowledge of the Fundraising Code of Practice and GDPR.

### Skills

- Excellent written and verbal communication skills;
- Good analytical skills;
- Excellent attention to detail;
- Able to establish good interpersonal relationships, rapport and credibility with a wide range of people;
- A self-starter, able to act on own initiative and to organise, plan and prioritise own work load to meet deadlines;
- Able to work effectively within a small team;
- Ability to work under pressure and to demonstrate a professional approach in a range of situations;
- Fully computer literate.

### Personal Characteristics

- Committed to customer care and the provision of high quality services;
- Creative and flexible in outlook;
- Enthusiasm to build a career within the charitable sector and highly motivated and enthusiastic to support community needs across Surrey.

### Additional Information

- The post will necessitate some evening and weekend work for which time off in lieu will be provided.