**JOB DETAILS:**

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| Job Title: Senior Planned Giving Officer  | Department: Fundraising | Location: Head Office |
| Status: Permanent | Hours: 37.5 hours per week | Reporting to: Head of Planned Giving |

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|  Factor  | Essential Competency | Desirable Competency |
| Knowledge, Skills & Experience | * At least 2-year customer care experience
* Informed on the basics of legacy pledging such as Will writing procedures.
* High level of written and spoken English
* Numerate
* Experience of using a CRM system (or similar database)
* Excellent interpersonal skills, with a good sense of humour and the ability to work with a variety of people
* Enthusiastic and self-motivated possessing a calm, pleasant, welcoming personality and the ability to encourage and develop others
* Ability to manage confidential information in an appropriate manner
* Ability and willingness to work flexibly including some evenings (to attend events)
* Computer literate with excellent working knowledge of Microsoft Office packages and keyboard skills
* Intermediate level in Excel
* Ability to solve practical problems with minimal supervisions and can apply a common sense approach towards daily tasks and activities
* Positive self-starter, keen to find better ways to deliver tasks and objectives
* Demonstrates a high level of accuracy in work completed with a strong attention to detail
* Ability to analyse information and data to make judgements on issues presented, and to develop performance management reports.
* Highly organised individual, able to work independently and to tight deadlines
* Calm and positive under pressure
* Empathy with the work of Combat Stress
 | * Experience working with Raiser’s Edge
* Advanced level knowledge of Excel
* Experience working in a Legacy Marketing team
* Experience with MuchLoved

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| Communication & Building Relationships | * Excellent communication skills, both written and oral, and confident communicating with a wide range of people
* Excellent interpersonal skills with the ability to quickly establish and maintain good working relationships at all levels
* Excellent team worker – open and communicative, keen to help others achieve their objectives
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| Training & Qualifications | * Educated to A level or equivalent
* A willingness to attend any appropriate training courses and workshops to further knowledge and capability
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| Responsibilities  | See Job description |  |
| Other Requirements | * Satisfactory Criminal Records Disclosure
* Valid EU passport/ Right to Work in the UK
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