**JOB DETAILS:**

|  |  |  |
| --- | --- | --- |
| 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 |

|  |  |  |
| --- | --- | --- |
| 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 |
| 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 |  |
| Training & Qualifications | * Educated to A level or equivalent * A willingness to attend any appropriate training courses and workshops to further knowledge and capability |  |
| Responsibilities | See Job description |  |
| Other Requirements | * Satisfactory Criminal Records Disclosure * Valid EU passport/ Right to Work in the UK |  |