

PERSON SPECIFICATION

(Supporting the Policy on Equal Opportunities in Employment)



Planned Giving Officer

Department: Fundraising

Status: As per contract

Reporting to: Head of Planned Giving

Location: Head Office

Hours: As per contract, with minimum 2 days/ week in office

Band: 5.16

FACTOR	ESSENTIAL	DESIRABLE
Qualifications & Experience	<ul style="list-style-type: none"> • Educated to A Level or equivalent • An empathy with our work helping veterans • Ability to listen to our supporters, understand their motivations and reflect back on their interests • Ability to help shape the direction of legacy fundraising and being proactive in spotting opportunities • Strong written English and verbal reasoning skills • Strong attention to detail, ensuring a high level of accuracy • Comfortable answering and making supporter calls • Knowledge and understanding of a CRM database • Highly numerate • Ability to analyse data and use it as information for report writing • Responsible for maintaining the master spreadsheet of open legacy cases • Computer literate with knowledge of Outlook • Competent user of Excel • Knowledge of Sharepoint 	<ul style="list-style-type: none"> • Knowledge of Raisers Edge • Experience working for a charity • Knowledge of the work of Combat Stress • Knowledge of mailmerges • Some understanding of legacies
Skills & Knowledge Range and level of skills	<ul style="list-style-type: none"> • Proven ability to manage and prioritise own workload • Calm and positive under pressure • Understanding GDPR • Can apply a common-sense approach towards daily tasks and activities with minimal supervision • Take responsibility for a group of supporters, becoming their main point of contact 	
Personal Attributes	<ul style="list-style-type: none"> • Able to work on own initiative but also being an active member of the team • Keen to look for new opportunities and share within the team 	

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	<ul style="list-style-type: none">• Excellent communication skills, with the ability to establish and maintain good working relationships at all levels• Calm and positive under pressure• Full attention to detail• Keen to learn and apply knowledge to this role	
Other Requirements	<ul style="list-style-type: none">• Awareness of equal opportunities and diversity and inclusion• Right to work in the UK• Passing the DBS check	