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| **BATH & NORTH EAST SOMERSET COUNCIL - JOB DESCRIPTION** |
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| **DIRECTORATE** | **Sustainable Communities, Heritage Services**  | **POST NO: 32314** |
| **POST TITLE**  | **Development Officer**  | **GRADE: 5** |
| **RESPONSIBLE TO:**  **Philanthropy & Trusts Lead** |
| **REPORTING TO THIS POST: No Direct Reports**  |
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**1. PURPOSE OF JOB**

This new role will support the fundraising team and is crucial to Bath Heritage Services’ future fundraising success, contributing to raising funds for revenue projects and capital campaigns, including the ambitious transformation of the new Fashion Museum.

The post holder will take responsibility for developing small to medium individual giving campaigns, the development of a new loyalty membership programme and low-medium level corporate partnerships. They will coordinate supporter communications and events and provide data management and fundraising analysis for the whole team to deliver income growth and enhance and grow supporter engagement and loyalty.

The position will play a pivotal role in the implementation and integration of a new fundraising CRM system in 2024/25 and will drive the research and identification of new individuals, trust and foundations and corporate fundraising prospects to ensure the revenues are maximised.

**2. PRINCIPAL ACCOUNTABILITIES**

* Support the development and implementation of individual giving plans to recruit, retain, and engage individual donors and foster loyalty.
* Provide donors with regular, timely, informative, and engaging communications and updates.
* Maximise small to medium donations from onsite and online visitors.
* ~~C~~oordinate the development and delivery of digital fundraising initiatives.
* Coordinate supporter communications for the Roman Baths and other businesses where applicable.
* Champion the organisation’s charitable purpose at every opportunity and ensure it is consistently understood across every touchpoint with recommendations for improvements, where applicable.
* Support the development of grant applications and reports by researching and identifying new opportunities and by contributing to specific elements of applications or reports as required.
* Identify opportunities for new individuals and low/medium-level corporate partnerships to support Bath Heritage Services’ work.
* Assist fundraising team colleagues in managing corporate partnership and sponsorship agreements, including research and delivery of benefits and reporting.
* Work with the fundraising team to deliver cultivation plans to grow the Fashion Museum and Roman Baths philanthropic giving, including identifying new prospects and supporting our donor stewardship.
* Support with designing and delivering cultivation and community fundraising events/campaigns across the year.
* Support the development and launch of a new Friends/Loyalty membership programme.
* Provide support for the implementation and integration of a new Customer Relationship Management (CRM) system.
* Ensure all low-level donor data is accurate and up to date with timely processing of donations.
* Provide administrative support on fundraising systems and processes, such as Gift Aid pledges and claims, Direct Debit payments, and bank account reconciliations and ensure all fundraising data is recorded following data protection legislation.
* Provide accurate monthly reporting on low-level donor income streams and develop donor analysis and reports as briefed, to enhance and grow supporter engagement and loyalty.

 **Service Development and/or Delivery**

* With the Fundraising Team to ensure the effective and efficient implementation of Council policies and the achievement of the Council's objectives, in particular the objectives of the Heritage Services Business Plan and the Council’s Financial Plan.
* To contribute to co-operative working across services following the Council's Vision and Values. To contribute to cross-service initiatives as required.
* To ensure effective and accessible communication with staff, service users, the general public, and others as appropriate.
* To support the Council’s objectives of being carbon neutral in 2030 in response to the declared Climate Emergency.

**Other**

* Adopt a proactive approach to developing and maintaining excellent relationships and communication channels with a wide range of contacts including managers, external stakeholders and suppliers, staff, and employee representatives.
* Positively represent the Museums to external organisations.
* There will be occasions when additional hours working is required and this may include weekends or evenings.
* Liaise with other networks, organisations, and wider business partners.
* Ensure conformance to equal opportunity and data protection policies.

**3.VALUES AND BEHAVIOURS FRAMEWORK: Improving People’s Lives**

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|  | We are *bold* in our approach, set aspirational goals for ourselves and create innovative solutions to tackle problems and adapt to changing circumstances. This value demonstrates that we are proactive, take action and deliver outcomes which improve people's lives.  |
|  | We *empower* our staff and the people of Bath and North East Somerset so that they have the confidence and ability to find solutions for themselves and others. This value demonstrates how we develop our staff so that they are knowledgeable, are trusted to make decisions, able to challenge us and have the authority to be enablers. |
|  | We are ***supportive*** and work together to build trusting relationships. Our staff give help and encouragement to the people of Bath and North East Somerset and each other. This value describes how we are curious, collaborative and care for each other, our residents and the environment. |
|  | We are **transparent**, honest and accountable. This value demonstrates that we act with integrity, are open to criticism, are honest about our mistakes and want to improve and do better so that we deliver on our promises. |
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These Values are underpinned by a set of behaviours for all staff, managers, and leaders. These Values and Behaviours are used to support and inform our recruitment decisions, staff development and organisational behaviour.

**4. DIMENSIONS**

**The business.**

Heritage Services is a business unit within the Council with bespoke financial and governance arrangements agreed by the Council in 2004. It works to rolling 5-year financial targets agreed by Cabinet annually and supported by business planning, review and monitoring processes that have been cited as ‘national best practice’ by the Audit Commission, and ‘local excellent practice’ by the Council’s internal auditors. The Philanthropy & Trust & Foundations Lead plays an important and central role in supporting the delivery of the business plan to achieve the Council’s financial targets.

**Business performance.**

Heritage Services competes commercially in the national and international Visitor Attractions sector. The Service welcomes c.1 Million visitors every year, most of them visiting Bath and its attractions for the first time. The Roman Baths & Pump Room is the only local authority-run visitor attraction in the UK to be a member of the Association of Leading Visitor Attractions (ALVA) and is the only local authority service of its kind to operate at no cost to the local taxpayer. The Service delivers an annual profit, after all costs, of c.£6 Million p.a. and competes in the national and international visitor and tourism market. The annual profit generated is equivalent to a reduction of £71 in every Council Tax bill within the district.

**Heritage Services budget (2023/24):**

- external turnover £21 Million p.a.

- net profit to the authority of £10.6 Million p.a.

**Economic impact (2017/18):**

- the Roman Baths levers £107m p.a. into the local economy (University of Bath 2012);

- Heritage Services’ net profit to the authority of £10.6m p.a. equates to:

- £56 net income per resident of B&NES (approx.);

- £65,000 net income per Heritage Services staff member.

**Supporter Development**

The Service is looking to move away from a transactional approach to it engagement with users. We’d like to change the way that we see the people who interact with us from visitors, funders, customers, Discovery Card Holders etc to ‘Supporters’. Our overriding aim will be to connect people emotionally with our mission and provide different ways for them to make an impact alongside us. This will mean a review of our digital infrastructure, our audience understanding and our culture.

**Fundraising**

The Service is adept at raising funds from Grants, Trust and Foundations. However, a lack of capacity previously has meant that corporate partners and individual donors are not currently engaged as well as would be expected. The *Fundraising, Marketing and Supporter Development Manager* role was introduced in April 2023 to bring a strategic overview to marketing and fundraising endeavors across the organization. They are now developing a strategy and building a team to ensure fundraising success for the organization.

**Service Scope:**

Heritage Services includes a number of service areas whose activities are eligible for grant-aid from external sources. These include:

- The Roman Baths and Pump Room

- Victoria Art Gallery

– Bath Record Office

The Service works closely with the World Heritage Manager and has an ongoing interest in the presentation and interpretation of the ‘City of Bath’ UNESCO World Heritage Site.

There are three independent charities that support our work: The Roman Baths Foundation, the Fashion Museum Foundation, and the Friends of Victoria Art Gallery.

**5. PHYSICAL EFFORT AND WORKING ENVIRONMENT**

**Physical Effort.**

The post may require occasional physical effort in transporting portable equipment and/or other promotional materials. Reasonable workplace adjustments can be made if the post holder indicates that he/she has a condition that makes him/her unable to do this.

On occasion, it is necessary to carry materials or equipment from the ground floor. Manual Handling training is provided.

**Working Environment.**

The post is normally office-based but some onsite outdoor work could be required, such as the Roman Baths. The post-holder is required to walk between the Pump Room and Victoria Art Gallery on a regular basis (1km). The office is on the third floor of the Pump Room office block and there is no lift.

**Health & Safety at Work**

Employees at all levels (which for the purposes of this policy includes Councillors, volunteers and contractors working for the Council) are charged under the Health and Safety at Work, etc. Act 1974 with the duty of care for their own safety, the safety of fellow-workers, and of any other person affected by the Council's work activities. Employees also have a duty to co-operate with the Council to enable it to carry out its responsibilities and not to interfere with anything organised to promote health, safety and wellbeing. Thus, the Council looks to every employee to maintain continuous awareness of safety requirements, alertness to existing or potential hazards and awareness of the importance of working safely, minimising risk and reporting hazards.

**Equalities**

Bath and North East Somerset Council is committed to equality of opportunity for everyone and believes that the diversity of the local community is a major strength that contributes to the social and economic prosperity of the area.

The Council will ensure that no resident of, or visitor to the area, job applicant, employee or other person associated with the Council is treated inequitably or in an unlawful or unjustifiably discriminatory manner.

Employees have a duty to undertake their roles and ensure that they and others adhere to the Council’s equalities policy and procedures.

**6. GENERAL**

Undertake such other duties and responsibilities as are specified by the Head of Service and are commensurate with the level of the post.

The post holder is required to work outside normal office hours.

This job description is not a complete list of duties but gives a general indication of the range of work undertaken. It will vary over time as demands and priorities change. The team structures within the Heritage Service operate with a high degree of collaboration and flexibility, individual service portfolios may therefore change over time and post holders are expected to undertake any other duties commensurate with the general level of responsibility of the post.

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| **6. PERSON SPECIFICATION** |
| **POST TITLE** |  |
| **QUALIFICATIONS:** | **Essential** | **Desirable** |
| Educated to A-level or equivalent standard | X |  |
| **PERSONAL QUALITIES** |
| Energetic, friendly, and creative with a clear focus on achieving results and able to work in a fast-paced, changing environment. | **X** |  |
| **KNOWLEDGE & EXPERIENCE** |
| Strong customer relationship management skills and care with an understanding of donor management and ability to build loyalty and sustain and grow connections. | **X** |  |
| Experience in managing effective relationships with a wide range of stakeholders. | **X** |  |
| Experience of supporting fundraising campaigns and/or corporate partnerships to business success. | **X** |  |
| Some knowledge of fundraising codes of practice, and data protection legislation | **X** |  |
| Experience of prospect research and ability to research and develop opportunities. | **X** |  |
| Passionate about the power of Museums, Heritage and Culture to improve people’s lives | **X** |  |
| Comprehensive and flexible communications skills, including the ability to write persuasive fundraising text and reports. | **X** |  |
| Some experience of data management and using data for reporting purposes. | **X** |  |
| Committed to the principals of supporter development with good IT skills, an analytical mind and experience of using fundraising CRM systems  | **X** |  |