

## JOB PROFILE: SENIOR DONOR RETENTION EXECUTIVE

Role:	Senior Donor Retention Executive	Date profile last reviewed:	November 2024
Name:		Reports to:	Direct Marketing Manager

### MAIN SUMMARY OF ROLE:

The postholder will meet the fundraising strategy aim of retaining and engaging with over 12k regular donors by the end of 2027 and will also drive deeper engagement with the wider supporter base. They will maximise fundraising income and supporter engagement, generated through both offline and digital activity through stewardship and conversion/development campaigns to uplift warm contacts. The post holder will take the lead on scoping, proposing and implementing supporter stewardship, conversion and development campaigns as standalone activity or to support other non-digital stewardship activity with the right message to the right people at the right time.

### KEY ACCOUNTABILITIES/RESPONSIBILITIES:

- Support the Direct Marketing Manager to deliver the annual programme of supporter stewardship and retention to meet the targets in the business plan and make recommendations about improvements and new opportunities.
- Create bespoke supporter journeys for each segment of new, existing and lapsing supporters, and to monitor their effectiveness.
- Conduct donor research in partnership with agencies, then interpret the findings and apply the learning.
- Create and manage the delivery of a wide range of offline and digital stewardship campaigns including a testing programme to identify the most effective channels for retention, engagement and uplift.
- Set relevant targets for individual and programme stewardship campaigns for both regular givers and cash donors, constantly evaluating income and ROI.
- Set and achieve targets for supporter retention by lowering attrition rates on the regular giving donor base, as well as reactivating lapsed RG donors.
- Achieve agreed income uplift from RG upgrade campaigns.
- Use income information, analytics, user research and audience insight to develop and optimise activity, identifying ways to reach current and lapsed supporters to drive deeper engagement
- Produce and share regular analytical reports measuring campaign performance and impact.
- Complete monthly reforecasts and report variances with commentary to the Direct Marketing Manager.
- Have an understanding of Charity and Data Protection Regulation legislation including but not limited to, Institute of Fundraising, Charity Digital Code, Fundraising Regulator and Charity Commission Guidelines.
- Keep abreast of direct marketing trends and practice within the third and for-profit sector.
- Ensure all activity reflects the Fund's brand guidelines, tone of voice, aims and objectives.
- Manage positive relationships with all direct marketing suppliers including media buyers, creative agencies, printers and payment processors.
- Carry out any other duties within the scope of the role.

COMPETENCIES REQUIRED FOR THE ROLE	
Essential	Desirable
<ul style="list-style-type: none"> <li>Analysing</li> <li>Delivering results and meeting stakeholder expectations</li> <li>Writing and reporting</li> <li>Planning and organising</li> <li>Deciding and initiating action</li> <li>Entrepreneurial and commercial thinking</li> </ul>	<ul style="list-style-type: none"> <li>Adapting and responding to change</li> <li>Creating and innovating</li> <li>Relating and networking</li> <li>Applying expertise and technology</li> <li>Presenting and communicating information</li> <li>Following instructions and procedures</li> </ul>
QUALIFICATION(S), KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED FOR THE ROLE	
<b>Academic or Professional Qualifications (or equivalent):</b>	
<p style="text-align: center;"><u>Essential</u></p> <ul style="list-style-type: none"> <li>Literate and numerate with a good standard of education</li> </ul>	<p style="text-align: center;"><u>Desirable</u></p> <ul style="list-style-type: none"> <li>Membership of the CloF or similar recognised marketing qualification</li> </ul>
<b>Knowledge/ Experience:</b>	
<p style="text-align: center;"><u>Essential</u></p> <ul style="list-style-type: none"> <li>Proven experience in managing mass market donor or customer retention / loyalty activity and thorough awareness of key direct marketing channels.</li> <li>Excellent understanding of digital and offline marketing principles and best practices.</li> <li>Experience of delivering successful multi-channel direct marketing campaigns.</li> <li>Proven experience in delivering multiple campaigns simultaneously.</li> <li>Experience of effectively briefing and managing ongoing relationships with agencies.</li> <li>Experience in creating supporter/customer journeys designed to maximise loyalty, tailored to a range of audiences.</li> <li>Adept in the use of CRM databases, MS Office applications, particularly Excel</li> </ul>	<p style="text-align: center;"><u>Desirable</u></p> <ul style="list-style-type: none"> <li>Experience of using the CARE database or similar</li> <li>Experience in developing content for different audiences to drive conversion.</li> </ul>
<b>Skills/Abilities:</b>	
<p style="text-align: center;"><u>Essential</u></p> <ul style="list-style-type: none"> <li>Works in a systematic and methodical way.</li> <li>Excellent oral and written communication skills with a thorough attention to detail. Writes clearly and succinctly, in a well-structured and logical way.</li> <li>Follows instructions and adheres to policies and procedures.</li> <li>Manages time effectively, meets deadlines and prioritises workload.</li> <li>Works well as part of a team</li> <li>Takes initiative, acts with confidence and works under own direction.</li> <li>Keeps abreast of digital trends and tools.</li> </ul>	<p style="text-align: center;"><u>Desirable</u></p> <ul style="list-style-type: none"> <li>Strong interpersonal skills, relating well to people at all levels.</li> <li>Creative flair, with the ability to spot a good story or opportunity.</li> </ul>
<b>Other Requirements:</b>	
<ul style="list-style-type: none"> <li>Travel to other Fund and UK locations (as appropriate).</li> <li>Such other duties that occasionally arise, which fall within the purpose of the post.</li> </ul>	

## **Signature**

I confirm this job profile has been drawn up with my full involvement and accurately reflects the responsibilities of the role.

Postholder's Signature:

NAME:

Line Manager's Signature:

NAME:

Date: