Application Pack

Legacy Fundraising Officer





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Introduction



David Loxton, Head of Communications and Fundraising at Britain Yearly Meeting (Quakers)

This is an exciting time to join us and make a real impact.

Our Trustees recently agreed strategic priorities for the next 5-10 years to support the church to reinvigorate Quakerism.

This includes:

- supporting Quaker meetings and other groups to be diverse, to thrive and grow
- working for a sustainable and peaceful world
- Simplifying structures and practices in our local and national organisation.

Fundraising will play a crucial role in the charity's ongoing financial sustainability, and we are recruiting a brand new fundraising team to deliver this goal. This is an exciting opportunity to join that team, building and delivering this new phase of our development.

We hope the information in this pack will fire your interest. Quakers are inspired by faith to work for a just, peaceful, and sustainable world. We seek to fill the gaps, to work where help is most needed, alone or with others – wherever we will have the greatest impact.

If you want to join a new fundraising team and to contribute to the work of the Quakers, we look forward to receiving your application.

You will find in this application pack background information about the Quakers, salary and benefits of working for us along with the job description/ person specification for the post.

Kind Regards,

David Loxton
Head of Communications and Fundraising

About us

About Quakers

The Religious Society of Friends (Quakers) is a radical faith group with its roots in Christianity. It emerged in the mid-17th century as a group with no separate priesthood, and with a form of worship based in silence.

Quakers have been committed to peace, equality, simplicity and integrity throughout history, and are known for work to bring about social change over the years, such as on the abolition of the slave trade, the relief of suffering in wartime, improving living conditions for factory workers and the introduction of same-sex marriage.

You can read more about the story of Quakers at www.quaker.org.uk/intro-quakers.

About Britain Yearly Meeting

Britain Yearly Meeting (BYM) is the national umbrella organisation for Quaker meetings in Britain. We provide events and support services to nearly 500 local Quaker meetings across Britain, carry out peace, sustainability & social justice work on their behalf, and work to raise public awareness of Quakerism.

All Quakers in Britain are invited to come together at Yearly Meeting (the annual sessions of Britain Yearly Meeting), which meets to explore, through worship, the issues of concern to British Quakers, and to guide the work of the national charity.

We are a registered charity with an annual turnover of around £12m. Responsibility for the charity lies with the fifteen Trustees of Britain Yearly Meeting, appointed from among the Quaker community. We are based at Friends House (opposite Euston station in central London), which houses our central offices accommodating 150 staff.

You can download our Trustees Annual Report & Financial Statements here: www.quaker.org.uk/annualreport

The work of Britain Yearly Meeting is carried out through five departments:

- Quaker Life supports Quaker meetings in their life and worship, oversees Quaker outreach, provides training, and organizes events for children & young.
- Quaker Peace & Social Witness runs programmes supporting peace, economic justice, sustainability and criminal justice, through campaigning, training, placements, community empowerment and by supporting Quakers in local activity.
- Quaker Communication & Services promotes public awareness of Quakerism, provides advocacy, media, web and publications services to the organisation, and oversees fundraising from Quakers, Quaker meetings and Trusts.
- Quaker Finance & Property oversees the budget and finances of BYM, including our ethical investment portfolio and properties.

Our wholly-owned trading subsidiary, Quiet Company, operates Friends House as a major conference venue and runs the building facilities. The company also runs Swarthmoor Hall, a historic house with accommodation in Ulverston, Cumbria (www.swarthmoorhall.co.uk).

You can read more about the governance structures of the Quaker organisation in Britain here www.quaker.org.uk/structure

About the team

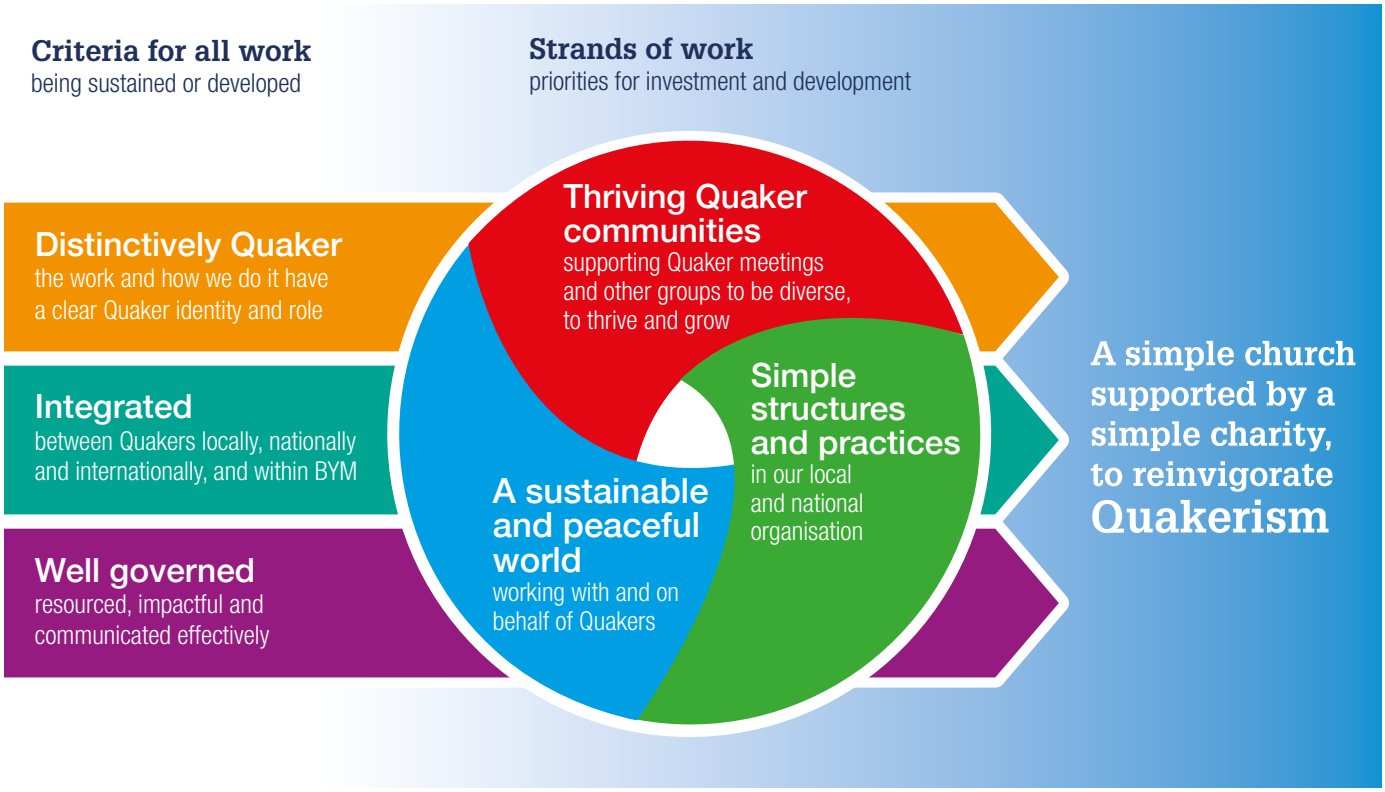
Quaker Fundraising

The new fundraising team is part of Quaker Communications & Services. The objectives of the department are:

- Bring Quaker values to the world
- Show how Quakers are active and relevant
- Increase the number of Quakers
- Engage Quakers in centrally-managed work
- Help Quaker meetings to thrive
- Secure funding for Quaker work

Trustees have agreed strategic priorities for the next 5-10 years and fundraising will play a crucial role in the charity's ongoing financial sustainability.

The department works closely with other parts of the organisation. Strategic responsibility for fundraising is held by the Head of Finance and Resources. A Trustees' Giving and Fundraising Development Group will act as advocate and champion for giving and fundraising to BYM, providing contacts and advising staff on effective messaging in relation to giving and fundraising for Britain Yearly Meeting's central purposes.




Make peace
a way of
LIFE
POWER from renewables
not rifles
NO
WAR
IMAGINE
A WAR FREE
WORLD
QUAKERS
FOR PEACE
& AGAINST THE
ARMS TRADE
Love

Our values

Our Values

How we act as Quakers goes together with what we believe.

Quakers don't have a fixed creed because we have found that the search for truth can lead us to new expressions of values as well as confirming existing ones. We call these values 'testimonies'. Today we focus on equality, peace, truth, justice and simplicity, and how they relate to one another.

Our testimonies encourage us to work for a more just, peaceful and sustainable world. It's not always easy to live this way, but as Quakers we encourage each other to keep trying.

Equality and justice

Quakers believe everyone is equal. This inspires us to try to change the systems that cause injustice and that stop us being genuine communities. It also means working with people who suffer injustice, such as prisoners of conscience and asylum seekers. We were campaigning for independent juries in the 17th-century, for marriage equality in the 21st, and for a range of things in between.

Peace

Quakers are perhaps best known for our peace testimony. It comes from our belief that love is at the centre of existence and that all human life is of equal worth. It has led Quakers to refuse military service and work creatively for peace. This has ranged from practical work in areas affected by violent conflict to developing alternatives to violence at all levels. This could be personal or international.

Truth and integrity

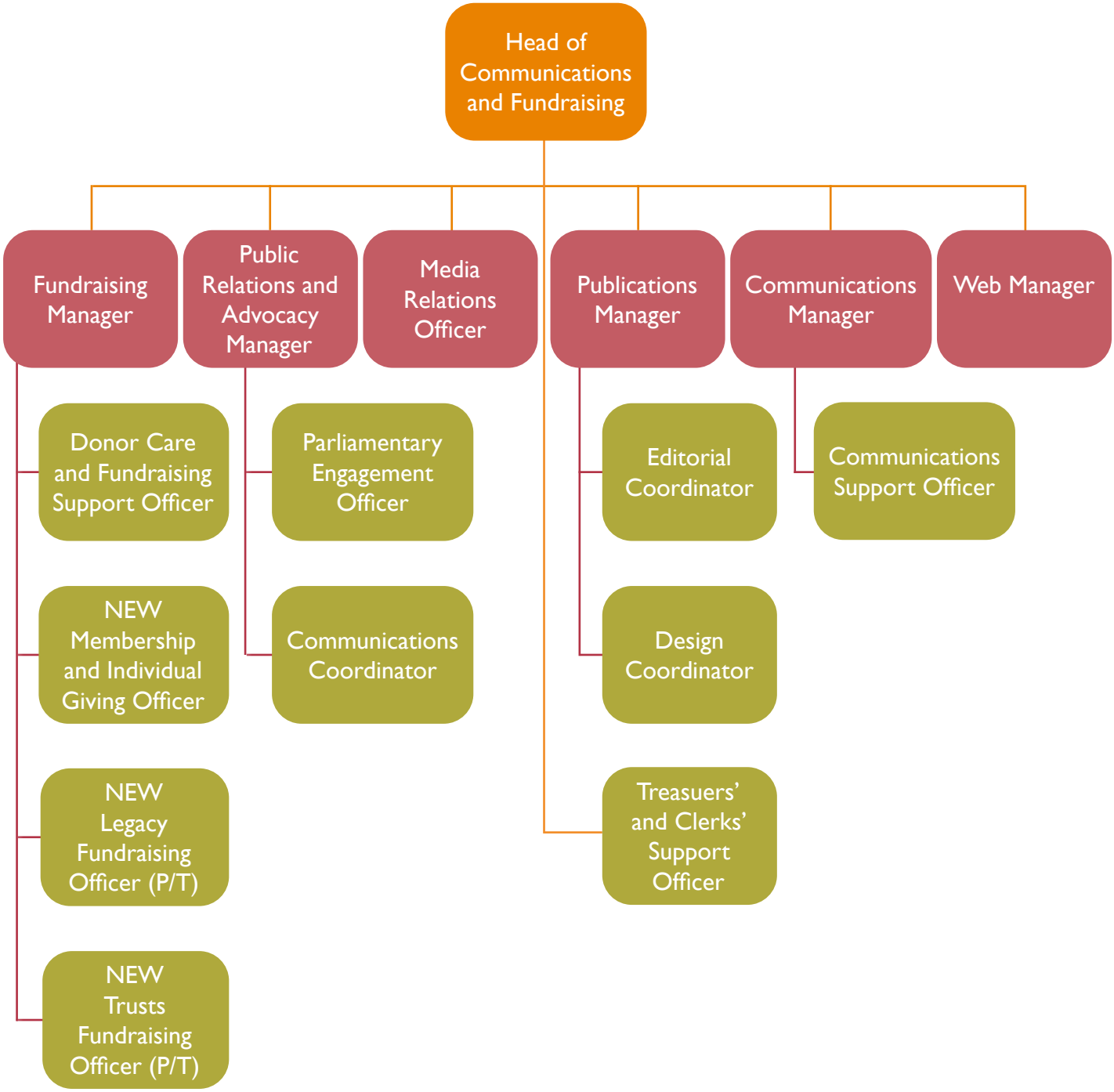
Quakers try to live according to the deepest truth we know, and we connect most deeply to this in the stillness of worship. This means speaking the truth at all times, including to people in positions of power. As we are guided by integrity, so we expect to see it in public life.

Simplicity and sustainability

Quakers are concerned about excess and waste in our society. We want to make sure our use of natural resources is sustainable. We try to live simply and to find space for the things that really matter: the people around us, the natural world, and our experience of stillness.

The process of living out our faith is often called Quaker Witness – you can find out more about Quaker work by listening to our podcast: www.quaker.org.uk/our-work/podcast

Organisation chart



About this post

Job purpose
The role of the Legacy Fundraising Officer is to encourage and enable members and others with connections to and sympathy with Quakers to support BYM with a legacy in their wills.

1. Key accountabilities and main tasks
Develop and implement a legacy promotion plan for BYM, as follows:

- Conduct research and pilot engagement exercises to understand how best to motivate members, and wider communities, to support BYM with a legacy.
- Test mechanisms and channels for communicating about legacy support
- Informed by the outcomes of the above, develop consistent, well-articulated and tailored communication about BYM's priorities, objectives and work, and the relevance and significance of support for these through legacies.
- Develop and embed donor-care and engagement
- Develop and maintain effective systems and processes, especially in respect of donor care and recording of legacy pledges

Reporting
- Ensure that appropriate performance data is collected, analysed and regularly shared with line manager as required.
- Ensure that all fundraising activities are carried out in line with the Fundraising Code of Conduct and best practice.

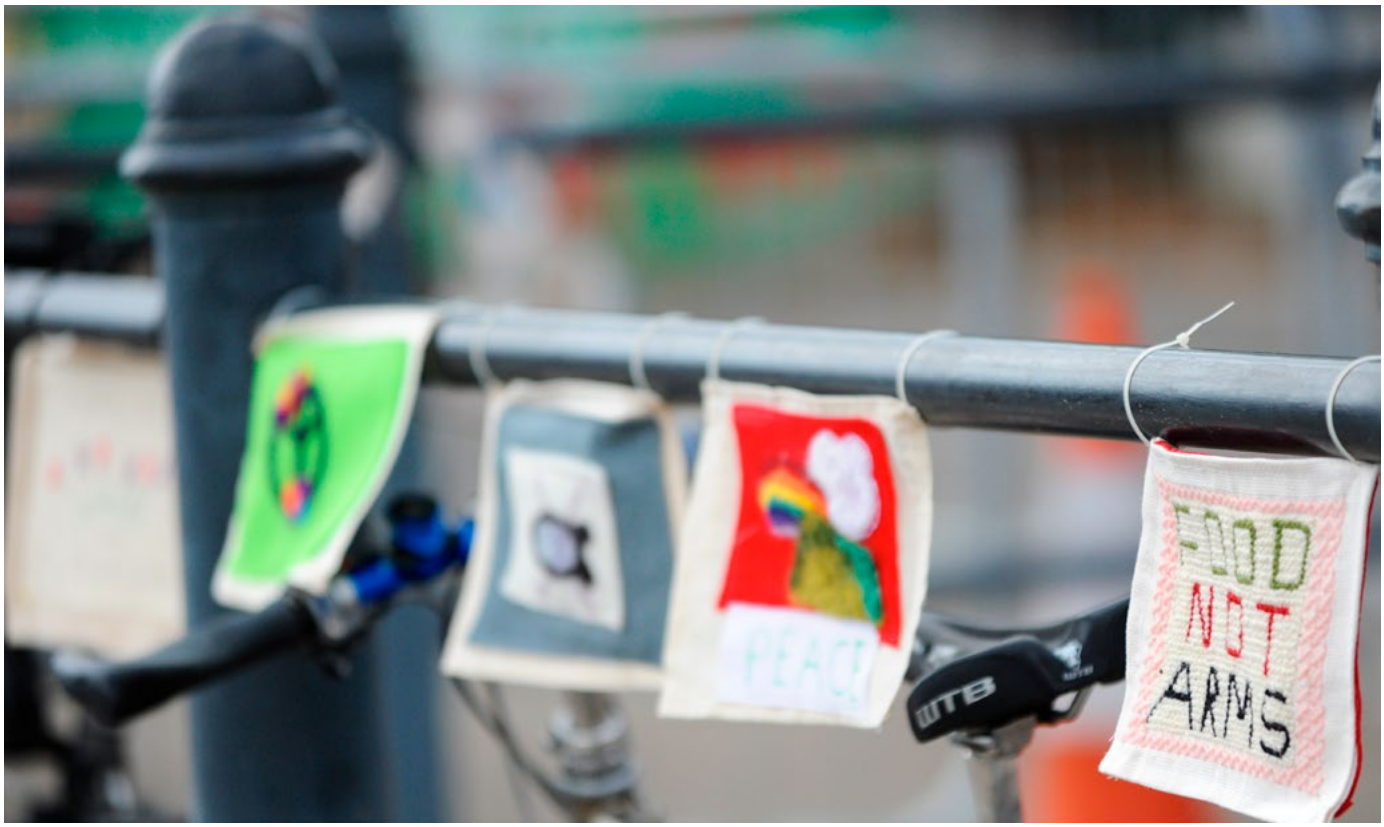
Management of work
- Manage the delivery of fundraising activities within agreed budgets and timescales.
- Work collaboratively with other departments as appropriate.

2. Intellectual demands
- Maintain a good understanding of Quaker faith and practice, with particular reference to how Quakers (but also other communities) are likely to respond to legacy promotion propositions.
- Keep abreast of professional and other developments in the voluntary/non-governmental sector – in particular relating to legacy fundraising.
- Maintain a good understanding of fundraising best practice and relevant advice and regulation from the Charity Commission and Fundraising Regulator.
- Apply Quaker values and experience to all areas of the work.
- Good understanding of use of systems, and the initiative to be able to propose improvements as needed.

3. Judgements
- Deciding on appropriate reference to line manager, ensuring that they have access to clear and accurate information to enable effective decision-making.
- The role demands an ability to research the facts and analyse them dispassionately.
- The post requires the ability to communicate persuasively and convincingly.

4. Use of resources
- Be responsible for the effective deployment of resources to achieve the agreed objectives.

About this post



5. Communications

Internal: 30% (Paid staff)

- Primary contacts are with Finance Department staff, Communications, Programme Managers, Operational Managers.

External: 70% (Non paid staff)

- BYMT Giving and Fundraising Group
- Local and area meetings, committees etc.
- Local Friends.

6. Physical demands and coordination

The post makes no unusual physical demands.

7. Working conditions and emotional demands

- Some travelling and weekend working is required.
- For the most part, however, working conditions and emotional demands are within the normal range.

Other responsibilities

- Responsible for ensuring that BYM's Equalities Policy is adhered to in all aspects of the role
- Responsible for ensuring that BYM's Health & Safety Policy is adhered to at all times
- Responsible for ensuring that BYM's commitment to sustainability is adhered to in all aspects of the role
- Responsible for ensuring that BYM's Data Protection Policies are adhered to at all times
- Responsible for ensuring that BYM's Safeguarding Policy is adhered to at all times
- Responsible for ensuring that BYM's fundraising activities are in line with the Fundraising Regulator's Code of Conduct.
- To undertake duties and responsibilities commensurate with the post.

Person specification

Essential knowledge

- Knowledge of and sympathy with Quaker values.
- Knowledge of fundraising regulation and best practice
- Knowledge of computerised database systems, MS Word and Excel.

Essential experience

- Demonstrable relevant experience in the field of Legacy Fundraising/Marketing
- Have knowledge and understanding the motivation of legacy pledgers
- Experience of providing high quality bespoke stewardship to legacy supporters
- The ability to provide technical and specialist advice on areas of legacy giving to internal and external audiences and liaise with legators, solicitors, executors and co-beneficiaries in order to maximise income from bequests.

Essential skills

- Good inter-personal and influencing skills.
- The sensitivity to respond appropriately to a range of audiences.
- The ability to communicate effectively and concisely, both in writing and orally.
- The ability to work collaboratively as part of a team.
- The ability to manage often conflicting demands within tight timeframes and finite budgets.
- Computer literacy.

Desirables

- Experience of fundraising for faith-based organisations
- Certificate or Diploma in Fundraising
- Experience of managing a programme of legacy marketing including the organisation of key campaigns such as Make a Will Month and digital and print communications
- Educated to degree level (or equivalent).



Competencies

Influence
- Uses understanding of others to influence outcomes
- Negotiates to resolve differences while maintaining support
- Builds solutions with others
- Is politically aware and able to use influence without authority
- Builds networks, creating productive connections
- Influences others at all levels of the organisation

Planning
- Translates insights, knowledge and analysis into plans
- Applies awareness and insights of the external environment
- Sees fundraising within the context of the wider organisational strategy and objectives
- Identifies trends and relationships in complex information
- Critically filters information and shows good judgment
- Analyses risk

Communication
- Engages others through effective dialogue
- Understands the needs and agendas of others and is able to empathise
- Effectively adapts style to situation and audience
- Engages others through active listening
- Contributes opinion with conviction
- Has excellent presentational skills and the ability to 'pitch' effectively for new business
- Is able to articulate the case for support for the organisation with knowledge, passion and conviction

Performance Management
- Creates and develops high performing teams
- Inspires, motivates and engages people to improve their performance and that of others
- Drives accountability for delivering goals and manages the consequences for those that under-perform
- Helps individuals to recognise their responsibility to develop their performance
- Draws in expert support where required, e.g. HR

Working across the organisation
- Thinks and acts in the best interests of wider organisation
- Encourages others to build collaborative relationships with all parts of the organisation and creates a
- shared culture of fundraising across the organisation

Fundraising
- Demonstrates profound understanding of the relationship between the donor and cause
- Demonstrates and applies specialist knowledge in a number of fundraising disciplines (or can apply
- previous experience/ expertise to a fundraising setting)
- Understands and applies knowledge and principles in fundraising disciplines which are not areas of experience and expertise and counter-balances within team
- Knows where and how to access information and advice on best practice in fundraising
- Is creative in spotting new income generation opportunities
- Works with others to create new ideas and challenges others to see things differently
- Turns ideas with potential into reality
- Takes considered risk when the reward justifies it

Governance, finance and the law
- Fully understands the relevant elements of charity and corporate law and regulation and how they relate to the fundraising in the organisation.

Working for Britain Yearly Meeting

Britain Yearly Meeting is a national charity employing around 200 people. Its purpose is to work for, with and on behalf of Quakers in Britain.

About our organisation

Quakers is the name often used for the Religious Society of Friends. Although we have our roots in Christianity, we also find meaning and value in the teachings and insights of other faiths and traditions.

In Britain there are about 20,000 Quakers. We have 500 local Quaker Meetings, grouped into 72 'area meeting' charities. All these charities are affiliated to Britain Yearly Meeting (BYM).

Britain Yearly Meeting (BYM) is a charity, formally known as 'Britain Yearly Meeting of the Religious Society of Friends'. The trustees are appointed by and accountable to British Quakers; and because this work is done for and on behalf of Quakers from the whole of Britain, the work we do is known as 'centrally-managed work'.

A Quaker workplace

We aim for our workplace to be consistent with Quaker values - broadly the same as most well-run progressive organisations. For example:

- We expect staff to respect each person regardless of age, race, religion, gender, transgender status, sex, sexual orientation, disability, marital or civil partnership status
- We avoid unjustifiable and unlawful discrimination in our employment practices
- We follow good employment practice, with clear and supportive line management
- We have a 1:4 ratio between the lowest and highest salaries
- We aim to be open and honest in all our work
- We avoid titles such as 'Mrs.' or 'Mr'.

Very few jobs with BYM are restricted to Quakers, although about 1/3 of the staff are Quakers or linked to Quakers in some way.

About Quakers

The Quaker way is based on silent worship, as a way to help people connect directly to God. Quakerism began in Britain in the 17th Century. Its roots are in radical Christianity, although today not all Quakers call themselves Christian.

Quakers share a way of life rather than a set of beliefs. We seek to experience God directly, within ourselves and in our relationships with others and the world around us.

Quakers are ordinary people, who try to live their values they can. This leads many Quakers to work for a better world.

Values that are important to us include truth and integrity; simplicity; equality; peace; and sustainability.

You do not need to be a Quaker to worship with us at one of our meetings.

You can find out more:

- From our website - www.quaker.org.uk
- By reading *Advice and queries* which is an introduction to Quaker belief (http://qfp.quaker.org.uk)
- By visiting the Quaker Centre at Friends House, which has leaflets and books, and volunteers who can answer questions
- Or ask for a free information pack – www.quaker.org.uk/more-information

Salary & benefits

Salary
£34,748 pro rata

Location
Friends House, Euston Road, London NW1

Hours of work
21 hours per week. There is some flexibility over the daily start and finish times.

Flexible working options
While the role is London-office based, we are open to discussions about flexible working patterns such as working from home or compressed working patterns.

Holiday
27 days a year plus bank holidays and three days for Christmas closure

Sabbatical scheme
Staff are able to take a nine-month unpaid sabbatical leave after five years' continuous service.

Subsidised café and restaurant
We have an on-site café which provides subsidised meals as well as a bookshop selling ethically sources goods.

Cycle to work scheme
We offer a cycle to work scheme which helps you save money on a new work bike and spread the cost of the bike over monthly tax-free instalments.

Annual Season Ticket Loan
We will provide with a loan of up to £7,500 to cover the cost of your season ticket repayable in 11 monthly instalments.

Pension scheme
Quakers have a generous pension scheme where we contribute 8% of your salary and you contribute 3% of your salary. You have the option to increase your contributions should you wish and to pay your contributions via salary sacrifice.

Sick pay scheme
We have a very generous sick pay scheme:

- If you have less than 12 months service, you are entitled to full sick pay for 3 weeks followed by three weeks at half pay.
- After 1 years' service, you are entitled to full sick pay for 3 months followed by 3 months at half pay, subject to a maximum of six months since the start of your service
- After 4 years' service you are entitled to full sick pay for six months followed by six months at half pay, subject to a maximum of 12 months.

Private Health Insurance
If you are off work due to sickness for more than 52 continuous weeks you will be eligible, subject to requirements of the scheme, to sick pay.

Employee Assistance Programme:

Quakers offers access to an independent, confidential employee assistance programme, which is available 24 hours a day.

Family Friendly Policies
Our family friendly policies give enhanced maternity and adoption leave. Once you have one year's service by the 15th week before your baby is born or you adopt, you will be entitled to six weeks at full pay, 20 weeks at half pay and 13 weeks at SMP.

How to apply

Please visit www.quaker.org.uk/jobs for the application form.

The closing date for applications is: **midday on 16 December 2019**.

The principles of equality and diversity are important to Quakers in Britain in all aspects of its work. The information you provide will help them to monitor and refine their employment practice and respond to the needs of the diverse range of people that the organisation comes in to contact with.

All applications will be considered immediately after the closing date.

Interviews will be conducted by David Hoxton, Head of Communications and Fundraising, and Beth Follini, Fundraising Manager, on **17 January 2020**.



Apply online at www.quaker.org.uk/jobs

