Job Related Information

This document includes information about the role for which you are applying and the information you will need to provide with your application.

1. Role Details

<table>
<thead>
<tr>
<th>Vacancy reference</th>
<th>13773</th>
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</thead>
<tbody>
<tr>
<td>Job title:</td>
<td>Philanthropy Manager</td>
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<tr>
<td>Reports to:</td>
<td>Head of Philanthropy and Events</td>
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<tr>
<td>Salary:</td>
<td>£39,324 to £46,924</td>
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<tr>
<td>Terms and conditions:</td>
<td>Academic Related</td>
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<tr>
<td>Grade</td>
<td>8</td>
</tr>
<tr>
<td>Duration of post:</td>
<td>Permanent</td>
</tr>
<tr>
<td>Working hours:</td>
<td>Full Time</td>
</tr>
<tr>
<td>Location:</td>
<td>Walton Hall, Milton Keynes</td>
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<tr>
<td>Closing date:</td>
<td>Tuesday 11 July 2017</td>
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<tr>
<td>Type of application form accepted:</td>
<td>A full and current CV.</td>
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<tr>
<td>Number of referees required:</td>
<td>3</td>
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</table>
2. Summary of duties

Purpose of Role
The primary focus of this role will be to drive new business and to secure philanthropic income for the University. This will be achieved through sourcing and securing philanthropic funds primarily through corporates, wealthy individuals, trusts and foundations.

You will be expected to work at a senior level within the University to support the growth of major gifts fundraising and expertise; cultivating, negotiating and securing high five, six and seven figure donations.

You will create and manage a pipeline of prospects with a view to develop long-term relationships, working closely with individuals and departments in the University to identify, explore and optimise existing relationships; whilst being creative about the introduction of new prospects for the University.

You will identify and develop tailored and compelling opportunities for funding partnerships, create a compelling 'sales' process, writing high calibre proposals and devising creative and compelling presentations.

Main Responsibilities
1. To create and manage a pipeline of prospects with a view to developing long-term relationships with each, securing funding of high five - seven figure gifts. In doing so, the post holder will work closely with individuals and departments in the University to identify, explore and optimise funding needs and existing relationships.
2. To design and implement cultivation and stewardship strategies for prospects and donors in order to ensure targets are realistic yet ambitious, and funding propositions are suitably tailored.
3. To create a compelling 'sales' process: writing high calibre proposals and devising creative and compelling presentations that involve other colleagues or relevant faculty members, where necessary.
4. To record and maintain data as appropriate.
5. Keep abreast of contemporary funding practices, opportunities and peer initiatives, to ensure the OU can play a key role in developing and maintaining a leading market practice.
6. To use judgement and sensitivity in the anticipation and resolution of any issues that could result in any damage to the OU’s reputation.

3. Person specification

Requirements  (E = Essential/ D = Desirable)

<table>
<thead>
<tr>
<th>Education, qualifications and training</th>
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<tbody>
<tr>
<td>• Graduate or holds an equivalent qualification (E)</td>
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<tr>
<td>• Member of CASE or the Institute of Fundraising (D)</td>
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Knowledge, work and other relevant experience
### Essential:
- Demonstrate ability to proactively fundraise for an HE, cultural or charitable institution and successfully deliver large donations
- Proven track record in securing high five - seven figure gifts, partnerships and/or sponsorship from companies
- Proven track record in securing multi-year funding; and gift renewals and growth
- Knowledge and ability to provide a high level of account management for key partnerships

### Desirable:
- Understanding or knowledge of the widening participation agenda in HE
- Experience of organising or designing bespoke events to cultivate or steward relationships

### Personal abilities and qualities

#### Essential:
- Ability to influence senior decision-makers internally and externally in philanthropic organisations; as well as wealthy individuals to ask/ negotiate for major gifts
- Ability to work flexibly, to deadlines, with tact and diplomacy, using judgement and initiative
- Ability to understand and interpret complex academic subjects into persuasive proposals and presentations for an external audience
- Ability to manage a number of bids simultaneously and juggle a busy and varied workload
- Ability to craft creative and bold approaches to corporates, in line with the OU’s strategy and brand
- Persuasive writing and negotiation abilities
- Numerate
- Excellent team-working and inter-personal skills

#### Desirable:
- Knowledge of fundraising from private individuals and trusts and foundations
- Knowledge of charity law and contracts
- Good understanding of database systems

### 4. Role specific requirements e.g. Shift working
None

### 5. About the unit/department

**The Development Office is a part of the External Engagement Group**

The key roles of the External Engagement Group (EEG) are to help the University to respond to the opportunities in the external environment and to project the University effectively to that outside world, to contribute to the successful delivery of the University’s Mission, Vision and Strategic objectives.
Under the leadership of the External Engagement Director, the External Engagement Group (EEG) comprises the University’s principal externally-facing Units – the Marketing Unit, Business Development Unit, Development Office, International Development Office and Communications Unit.

**The Development Office**

The Fundraising Team is led by the Director of Development who is responsible for securing philanthropic donations for the University, in support of the OU’s strategic plan.

There are two sub-teams:

**The Partnerships and Philanthropy Team** specialises in major gift donations; seeking to secure donations of £50,000+ for The Open University. This funding is secured from mixed portfolios comprising of individuals, trusts and foundations, corporations and institutional grant makers. As well as identifying and securing gifts via a mix of face-to-face meetings and comprehensive proposal writing, the team are also responsible for all stewardship, managing all reporting and invoicing following the initial gift. Other duties in the team include organising and running high-profile fundraising events; undertaking all prospect research and due diligence; and working across the university to identify and articulate key funding needs.

**The Alumni Fundraising Teams** seek support primarily from the OU’s alumni body (but also students, staff and others) and includes:

- **Legacy Fundraising**
  Secures support from people leaving gifts in their Will.

- **Annual Fund**
  Seeks one off and regular donations, usually up to £10,000 and includes an in-house telephone fundraising team.

- **Mid Value Programme**
  Raises gifts from £10 – 50,000.

The Development Office is also responsible for running and managing the OU’s first fundraising campaign ‘Open Up the Future’; securing £50 million in further philanthropic donations by 2019. It also responsible for managing the OU’s wider commemorative 50th Anniversary campaign.

The fundraising team is supported by colleagues working in finance, operations and database teams.

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### 6. How to obtain more information about the role or application process

If you would like to discuss the particulars of this role before making an application or have any questions regarding the application process please contact helenwalker@york-walker.com

### 7. The application process and where to send completed applications

<table>
<thead>
<tr>
<th>Please ensure that your application reaches the University by:</th>
<th>Tuesday 11 July 2017</th>
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<tbody>
<tr>
<td>E-mail your application to:</td>
<td><a href="mailto:helenwalker@york-walker.com">helenwalker@york-walker.com</a></td>
</tr>
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### 8. Selection process and date of interview

<table>
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<tr>
<th>The interview panel will be chaired by:</th>
<th>Gillian Hosier – Head of Philanthropy and Events</th>
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The other members of the interview panel will be:

| Jhumar Johnson – Director of Development |
| Clare Davenport Johnson – Head of Corporate Partnerships and Research |

The interviews will take place on: TBC

The selection process for this post will include Interview and job related task.

We will let you know as soon as possible after the closing date whether you have been shortlisted for interview. Further details on the selection process will also be sent to shortlisted candidates.

Applications received after the closing date will not be accepted.