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Fundraising & Marketing Assistant

Recruitment Pack

August 2021

**Our story**

We may not know much about engineering, but we do know engineers. We’ve been supporting IET (Institution of Engineering and Technology) members and their families since 1890.

We understand people and we understand how life can be at work and at home. It’s unpredictable, complex, demanding.

Amidst the busyness of our lives we often forget that being well is just as important as doing well.

More of us are feeling stressed in our jobs. One in four of us will have a mental health problem this year. More of us are living longer. Our health needs are growing yet we have a shortage of carers. Rising costs are forcing living standards down. And we’re facing a loneliness epidemic.

We all need to start taking better care of one another, because we all need a little support from time to time. Even engineers.

We wanted to know how we could do more, so we asked our community of engineers. Seven out of ten engineers worldwide said they wouldn’t ask for help even if they needed it. Yet they told us there isn’t enough support out there for day-to-day problems, let alone a crisis.

We’re here so engineers and their families never need to face life’s challenges without support. We want engineers across the world to feel supported in all aspects of their lives and to feel that it’s OK to ask for that support. We want them to be healthy and able to stand on their own two feet. We want them to feel looked after but also empowered by their professional community.

Funded by engineers, for engineers, Foothold is here for engineers and the people who matter to them most. Whatever the problem, big or small.

Foothold is a starting point, giving engineers the tools to make their life better right now.

Foothold is a network of skilled individuals who’ll listen to problems in confidence. It’s a source of options to help engineers meet their needs emotionally, physically, and financially.

Foothold is a place to regain balance and help others do the same. Foothold is here.

**Our challenge**

In 1890 a group of engineers decided that their Institution should do something for fellow engineers in need. In the almost 130 years since we have continued to develop services which support almost 1,000 engineers and family members a year, from across the globe.

And now as Foothold, The Institution of Engineering and Technology benevolent fund, we exist toensure that no engineer or their family needs to face life’s challenges without support and with 168,000 current members of the Institution of Engineering and Technology and many previous members spread across 150 countries this is a challenge.

Our vision is to increase the wellbeing of engineers and their families worldwide. Our targets are stretching to meet the growing needs of our community, so we’re now investing in our fundraising resource to help us meet this challenge. We’ve reshaped our fundraising, marketing and communications functions and are now looking for talented fundraising and marketing professionals to join us.

We are a small team who want to make a big impact. If you think that you have the skills and experience we need and are excited by the opportunity to join a thriving forward looking team we’d love to hear from you.



Jane

Jane Petit  
CEO

**Our beliefs**

Every call for help must be heard - we have a social duty to care about each other – as human beings. Any need no matter how big or small, is worthy of our support. Nobody should have to face life’s challenges alone.

Asking for help takes courage - we all need support from time to time - even the most capable among us. It takes strength to accept our own vulnerability. Nobody should feel ashamed to ask for help

The best support empowers - support is at its best when it puts people in the driving seat. When a person has the right tools to change their life, they’re more resilient to adversity strength to accept our own vulnerability. Nobody should feel ashamed to ask for help.

A problem shared is a problem halved - we can overcome challenges - together. Being part of a community means we’re there to support and empower one another

Our commitments

**We’re empathic** - we seek to understand needs as if they were our own. Through empathy and understanding we truly support.

**We’re joined-up** - we’re here to support with all aspects of life, and to help increase all-round wellbeing. People’s needs are connected, so our support must be too.

We’re trusting - we treat people as equals. Building relationships based on trust allows us to provide better, quicker support.

**We’re open-minded** - we listen without prejudice and act without discrimination. No challenge is too big or small.

We’re encouraging -we want people to feel able to stand on their own two feet. To feel they can make positive choices and changes in their life

We’re bold - to offer meaningful support, we must break down stigma, address the big issues and try new ideas without fear of failure.

**Our strategy**

**Why our help is important**

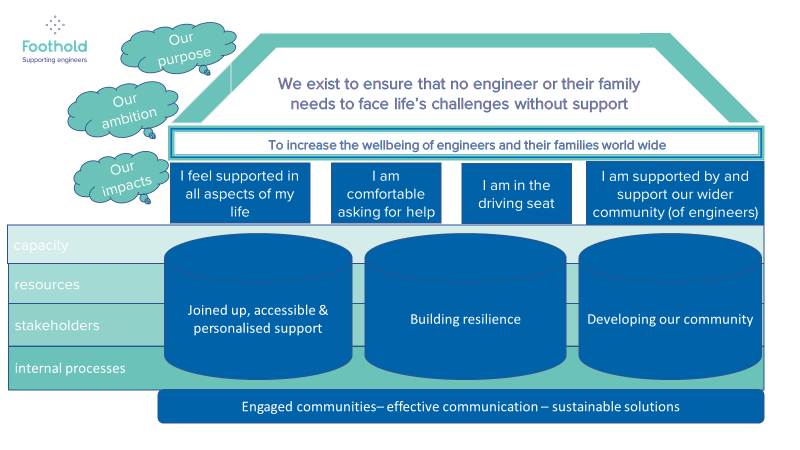
Our research showed that our community have three main areas of need:

* Work and employment
* Health and wellbeing
* Financial and legal problems

Our new strategy focuses on activities which support an increase in wellbeing, intended to empower our community by providing tools to help them help themselves.

Then, if engineers and their families experience life events and moments of transition such as getting sick, experiencing bereavement, redundancy or relationship breakdown (all common triggers for poverty) not only can we offer practical assistance with finances or legal matters, we have also increased their likelihood of coping.

**Our strategic framework**



Foothold Organogram

Board and Committee structure

Audit and investment committee

4 meetings a year

Service development committee

3 meetings a year

Disciplinary committee

As required

Remuneration committee

As required

Triage Advisor

**JOB DESCRIPTION**

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| --- | --- |
| **Organization** | Foothold (The IET Benevolent Fund) |
| **Job title** | **Fundraising & marketing assistant** |
| **Location** | Flexible remote with presence in our Holborn office for team meetings |
| **Reports to** | Fundraising and marketing manager |
| **Hours** | Permanent – 35 hours a week (flexible working – core hours Tues 10-11 am) |
| **Salary** | C £25,000 |

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| --- | --- |
| **Primary purpose:** | To deliver an impactful supporter care and stewardship programme to optimise retention and development, delivering exceptional experiences for the Foothold community.  To manage, coordinate and fulfil the efficient and accurate recording and acknowledgement and reconciliation of donations and Gift Aid.  To support the delivery of the fundraising and marketing strategy. |

**Key tasks**

**Supporter engagement**

* Be the first point of contact for supporters dealing with fundraising enquiries, requests for information, and feedback over the telephone and by email
* Identify opportunities to match supporters’ interests and motivations with opportunities to cross promote our support, volunteering and fundraising products
* Play an active role in developing and implementing the supporter journeys, creating content and experiences to delight our supporters
* Create personalised donor correspondence including thank you communications and regular impact updates, working in liaison with the marcomms team to source inspiring content including community stories

**Donation management**

* Process donations on to Beacon CRM in line with processing timescales and procedures
* Manage the process for donations from intermediary’s (The IET, Just Giving, Virgin Money Giving, CAF etc) downloading weekly reports and importing donations into Beacon
* Manage the Gift Aid scheme, working to maximise Gift Aid, following up missing declarations by phone, email and letter and submitting monthly claims to HMRC
* Proactively case manage legacy cases through the pipeline from notification to completion, liaising with solicitors and executors and providing updates and reports as directed by the Fundraising Manager
* Liaise with the Finance Manager on the monthly reconciliation between Beacon/Sage to ensure accuracy on donation processing
* Ensure the security and confidentiality of supporter donations and data, complying with GDPR, Fundraising Regulator, HMRC Gift Aid, PCI compliance and other Charity Laws and industry best practice

**Income generation**

* Support the fundraising/marketing manager to implement the fundraising and marketing strategies, taking the lead on projects as directed
* Prepare income reports and analysis, working with the manager to identify trends and opportunities to develop income

**General support**

* Provide administrative support for fundraising and marketing activities
* Attend regular supervision, team and staff meetings
* Undertake mandatory training as required by Foothold
* Take responsibility for Health and safety of yourself, your colleagues and your environment
* Ensure confidentiality of records and information is maintained in accordance with Foothold’s Confidentiality Policy and Data Protection policy GDPR
* Undertake any other tasks as identified by your manager or the CEO

**Fundraising & Marketing Assistant Person Specification**

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| --- | --- | --- |
| **Criteria** | **Essential** | **Desirable** |
| **Experience** | | |
| Experience working within a fundraising/marketing environment, collaborating with colleagues to achieve individual and team targets | 🗸 |  |
| Experience of building and developing successful relationships with supporters | 🗸 |  |
| Experience of leading on/project managing fundraising activities |  | 🗸 |
| **Education and qualifications** |  |  |
| No specific qualification is required, but evidence of recent continuing professional development in an area relevant to the post will be required | 🗸 |  |
| **Skills & abilities** | | |
| Demonstrate understanding of what makes exceptional supporter care | 🗸 |  |
| Demonstrate diplomacy, empathy and able to motivate and inspire supporters | 🗸 |  |
| Competent user of Microsoft Office applications, Excel and CRM systems | 🗸 |  |
| Confident communication skills with an ability to adjust tone and content for different audiences and able to work within brand and tone of voice guidelines | 🗸 |  |
| Ability to think creatively, offering new ideas, concepts and solutions | 🗸 |  |
| Effective time management skills in order to meet competing priorities | 🗸 |  |
| Accurate data inputting skills with attention to detail, understanding the importance of accuracy and timeliness and adherence to procedures | 🗸 |  |
| Ability to troubleshoot difficult situations, and deal with them calmly, diplomatically efficiently and effectively | 🗸 |  |
| **Knowledge** | | |
| Advanced knowledge of the Gift Aid scheme and familiar with preparing and submitting claims | *🗸* |  |
| Knowledge of data protection principles and GDPR | *🗸* |  |
| Knowledge of fundraising and income streams | *🗸* |  |
| Knowledge of legacy administration |  | *🗸* |
| Knowledge of project management systems eg. Asana |  | *🗸* |
| Knowledge of email marketing tools eg. Dotmailer |  | *🗸* |
| **Personal attributes** | | |
| A proactive, self-motivated and positive approach to work | 🗸 |  |
| Commitment to the core values and ethos of Foothold | 🗸 |  |
| A willingness to work flexibly with colleagues on other specified duties or projects as appropriate | 🗸 |  |
| A willingness to undertake training for further development | 🗸 |  |
| Commitment to anti-discriminatory practice and equal opportunities and an ability to apply awareness of diversity issues to all areas of work | 🗸 |  |

**How to apply**

Please send your CV and supporting statement outlining your interest in the post and how you meet the points in the person specification. Please also give the names of two referees who we will contact once an offer of employment has been made.

Applications should be submitted to [**fliss.rook@myfoothold.org**](mailto:fliss.rook@myfoothold.org) by 11am on Monday 23rd August.

Interviews will be held in the week commencing 30th August.

For a confidential discussion about the role please email [**fliss.rook@myfoothold.org**](mailto:fliss.rook@myfoothold.org) to arrange a time.

To find out more about Foothold visit our website **myfoothold.org**