



## Job Description

This form summarises the purpose of the job and lists its key tasks. It is not a definitive list of all the tasks to be undertaken as those can be varied from time to time at the discretion of the School, in consultation with the postholder.

**Job title:** Regular Giving Manager (Mid-Level & Legacy Marketing)

**Department/Division:** Philanthropy & Global Engagement (PAGE)  
**Accountable to:** Head of Regular Giving

### Job Summary

In November 2021 **The London School of Economics and Political Science (LSE)** launched the public phase of Shaping the World, a major philanthropy and engagement Campaign. It is helping to deliver a new strategic direction that will preserve and build on LSE's status as a world leading social science university, educating brilliant minds and creating knowledge that can transform global societies for global impact.

LSE's **Philanthropy and Global Engagement Division (PAGE)** serves, engages and cultivates a reciprocal relationship with alumni and friends, staff and students, volunteers, donors, global partners, organisations and the wider community to increase engagement, philanthropic income and strategic partnerships for agreed School priorities.

The **Alumni and Supporter Engagement** function in PAGE delivers an engaging programme of services, resources, events, communications, donor relations, giving and volunteering opportunities for alumni, donors and other friends. It consists of four areas: **Alumni Engagement, Supporter Relations, Regular Giving, and Communications**. Within this, the Regular Giving team coordinates, plans and delivers a programme of activity to encourage gifts to the School in support of strategic priority areas.

The **Regular Giving Manager (Mid-Level & Legacy Marketing)** will lead on the implementation of a new mid-level giving strategy aimed at recruiting, retaining, and upgrading donors at the four-figure level, and lead on legacy giving marketing. This role will play a key role in building both the major gift and legacy giving pipelines for the future and will work closely with the Philanthropy Team.

#### Main responsibilities include:

##### Mid-Level Giving (75%):

- Manage a pool of around 500 prospects with potential to give at the four-figure level and be the first point of contact for these prospects and build relationships through email, mail, and telephone calls.



- Create and implement a matrix for mid-level giving at the four-figure level. Build donor journeys for prospects that include direct mail, e-appeals, telephone calls, stewardship, invites to School events and other bespoke communications.
- Together with the Philanthropy Team and Philanthropy Research Team, regularly review the pool, and ensure successful prospect movement of both up and down pipelines.

**Legacy Marketing (25%):**

- Create and implement a legacy marketing strategy with the aim of increasing legacy leads for the Legacy Manager/Philanthropy Team and contribute to an increase in legacy pledges.
- Create and implement a matrix for legacy marketing to build journeys for those who have enquired about a legacy or have been identified as a legacy prospect. These would include specific legacy appeals, integrating legacy marketing into other appeals, and highlighting the role of legacies where appropriate.

**Duties and responsibilities**

**Strategy:**

- With the Head of Regular Giving, implement the new mid-level giving strategy aimed at recruiting, retaining, and upgrading donors at the four-figure level, and to continue to develop this strategy over time.
- Create and implement a matrix for mid-level giving at the four-figure level. Build donor journeys for prospects that include direct mail, e-appeals, telephone calls, stewardship, invites to School events and other bespoke communications.
- With colleagues across PAGE and LSE, identify and develop, including writing a case for support, attractive propositions at the four-figure level.
- With the Head of Regular Giving, create and implement a legacy marketing strategy with the aim of increasing legacy leads for the Legacy Manager/Philanthropy Team and contributing to an increase in legacy pledges.
- With the Legacy Manager, create and implement a matrix for legacy marketing to build journeys for those who have inquired about a legacy or have been identified as a legacy prospect. These would include specific legacy appeals, integrating legacy marketing into other appeals, and highlighting the role of legacies where appropriate.

**Activity:**

- Manage a pool of around 500 prospects with potential to give at the four-figure level and be the first point of contact for these prospects and build relationships through email, mail, and telephone calls.
- Regularly reviewing the prospect pool, using data analysis to identify individuals to be moved into and out of the regular giving mid-level pool.



- Produce regular giving specific case for support documents that can be used for both four and five-figure asks, including proactively identifying, sourcing, and coordinating content from funding recipients and donors to be used as case studies in communications.
- Lead on the creation of bespoke regular giving appeals targeted to four-figure donors for identified Campaign priorities. This includes content gathering, liaising with the design team, data segmentation and delivery of the appeals, across direct mail, email, telephone, and digital platforms including video content.
- Lead on the stewardship of 4-figure donors to the School, including acknowledgement of gifts, creating bespoke stewardship communications and other stewardship opportunities for this audience, including organising events.
- With input from the Legacy Manager, create new legacy collateral that can be used across the division, including bespoke legacy appeals.
- Working with the Communications Team and the Legacy Manager to create legacy related content for the Campaign website.

#### **Processes**

- To work with Systems & Data colleagues to create processes to track mid-level giving activity and effective reporting to track the impact the mid-level giving programme has on major gift and legacy pipelines.
- To work with Philanthropy Research colleagues to build processes to ensure effective pipeline management and successful movement of prospects both up and down the pipeline, both for major gifts and legacies.
- Once in place, to ensure that all mid-level and legacy actions are recorded accurately on the CRM to enable consistent tracking.

#### **Collaboration & Internal stakeholders**

- To proactively build and maintain excellent working relationships with PAGE colleagues, in particular the Philanthropy Team, to embed a collaborative approach to mid-level giving and legacy giving.
- To foster collaborative working relationships with colleagues across the School to develop attractive propositions at the four-figure level and create engaging content around such propositions, including Finance, Financial Support Office, Comms Team & Design Unit and Departments and Divisions.

#### **Analysis and evaluation**

- Lead on analysis and reporting for the mid-level regular giving and legacy marketing programmes, including producing monthly KPI reports, quarterly overviews, and appeal analysis to help inform future strategy.
- When relevant, disseminate data analysis and reporting to support others across PAGE.

#### **Other**

- Be a professional representative for PAGE and the School.
- Demonstrate a high level of discretion in dealing with confidential information.
- Stay proactively engaged with the latest best practice from the regular giving, marketing, and HE fundraising sectors and take responsibility for personal professional development.



- Provide mutual coverage of absence for the Regular Giving Officer to manage enquires and the acknowledgement process.
- Perform other duties as the Head of Regular Giving may from time-to-time request.

### **Flexibility**

To deliver services effectively, a degree of flexibility may be required in the duties performed in order to meet the exigencies of service. Job roles may also naturally develop over time and ongoing substantial changes to a role will be discussed between line managers and their staff, with job descriptions updated as and when appropriate.

### **Equity, Diversity and Inclusion (EDI)**

LSE is committed to building a diverse, equitable and truly inclusive university. All posts (and post holders) will seek to ensure diversity and inclusion, while opposing all forms of unlawful and unfair discrimination on the grounds of age, disability, gender identity, marriage and civil partnership, pregnancy and maternity, race, nationality, ethnic or national origin, religion or belief, sex and sexual orientation, or social and economic background.

### **Ethics Code**

Posts (and post holders) are assumed to have a responsibility to act in accordance with the School's Ethics Code and to promote the principles and values that the Code enshrines. The Ethics Code clearly states that the whole LSE community, including all staff, students, and governors of LSE, are expected to act in accordance with the principles which are set out in the Code. As such you are required to read and familiarise yourself with it. The School's Effective Behaviours Framework is designed to support this Code. It sets out examples for the six behaviours that all staff are expected to demonstrate, these can be found on the following link: [click here](#)

### **Environmental Sustainability**

The post holder is required to minimise environmental impact in the performance of the role, and actively contribute to the delivery of the LSE Environmental Policy.