

York Museums Trust

Job description

Job title:	Individual Giving Manager		
Department:	Development	Contract:	Permanent
Reporting To:	Head Of Development	Hours per week:	30

Role Overview

This role leads the development and delivery of integrated income strategies for Individual Giving (IG) programmes. The postholder will drive income growth, donor acquisition and retention, supporter journeys, compliance through data-led insight, and product and campaign management. They will oversee budgeted income targets and work collaboratively across York Museums Trust (YMT) to maximise supporter lifetime value.

As the organisation's internal expert for Individual Giving and supporter lifecycle management, the postholder will advise senior leaders on income optimisation and risk. The role requires significant expertise, sound judgement, and confident decision making that may impact organisational performance.

Key Focus in Year 1

- Support the Head of Development in embedding a strong fundraising culture
 - Establish robust fundraising foundations across all activity
 - Act as a stakeholder in the scoping group for the new YMT website
 - Launch the Giving Tree concept in York Museum Gardens
 - Deliver the 26/27 Patron Activity Programme
 - Review Patron and supporter programmes
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Hybrid Working Requirement

This is a hybrid role requiring a minimum of two days per week in a York-based office. The postholder will also attend previews and key evening activities as required, as agreed with the Head of Development.

Direct Reports

No direct line management, but the role provides functional leadership across fundraising products, CRM processes, supporter journeys, and most importantly patron and supporter relationships.

Role Description

Income Generation & Strategy

Operating within a competitive fundraising environment, the postholder will balance short-term income needs with long-term supporter value, compliance and reputational considerations.-

Key responsibilities:

- Design and adapt fundraising products using insight, innovation, and audience response
- Lead planning and delivery across:
 - Regular Giving (acquisition, upgrades, reactivation, long-term value modelling): Patrons / Members term value modelling)-term value modelling): Patrons / Members
 - One-Off Giving (appeals, in-memory, celebrations)
 - Gift Aid optimisation
 - Legacy giving strategy in collaboration with Comms & Marketing
- Develop automated and scalable donor stewardship approaches
- Create uplift strategies to transition supporters through giving tiers
- Prepare Trust and Foundation applications up to £10k

Regular Giving & One-Off Giving (Product Development)

- Lead year-round Regular Giving strategy: acquisition, upgrade, retention
- Deliver reactivation campaigns for lapsed donors
- Create seasonal and key-date giving opportunities-date giving opportunities
- Strengthen digital donation journeys with Comms & Marketing
- Embed regular and one-off giving across supporter touchpoints, including retail
- Integrate uplift asks and gratitude communications to enhance lifetime value
- Oversee strategy and management for collections and contactless giving points, including placement, host relationships, and ROI
- Ensure full compliance with fundraising regulations and internal policies

Donor Development (Relationship Development)

- Deliver campaigns and engagement plans for mid-value supporters / members
- Develop the pipeline for Major Donors and Patrons
- Maximise donor engagement at events, previews, and in-person activity
- Manage all elements of the annual Patron event programme

Supporter Experience & Innovation

- Optimise segmentation, targeting, and messaging using supporter data
- Embed consistent, values-led supporter journeys
- Identify new supporter upgrade and engagement opportunities
- Manage Patron stewardship, including:
 - Responding to enquiries
 - Producing bimonthly e-newsletters-monthly e-newsletters
 - Coordinating invitations and renewals
 - Delivering high standard Patron events-standard Patron events
 - Liaising with Finance for accurate income recording

Donor Acknowledgement & CRM Management

- Maintain accurate donor data in Beacon CRM
- Provide insight-led reporting and analysis
- Deliver timely and appropriate thank-you processes and renewal acknowledgements

Knowledge, Skills, Experience & Behaviours

Knowledge & Experience

- Strong understanding of cultural fundraising, strategy development, and business planning
- Proven success in developing and growing Individual Giving programmes
- Knowledge of donor cultivation, uplift strategies, and associated KPIs
- Understanding of GDPR, Gift Aid, and fundraising legislation
- Experience with CRM platforms (e.g., Beacon) and email tools (e.g., Mailchimp)
- Experience in:
 - Fundraising or income generating roles-generating roles
 - Meeting/exceeding income targets

- Donor relationship management and stewardship
- Supporting campaigns and events
- Digital fundraising and online donor engagement
- Working with high-net-worth individuals or major donors

Skills & Behaviours

- Excellent interpersonal, organisational and project management skills
- Ability to manage multiple deadlines
- High attention to detail and commitment to excellence
- Self-motivated, proactive, and collaborative, proactive-motivated, proactive, and collaborative
- Creative, opportunity focused approach
- Strong written and verbal communication
- Financial and budget management capability
- Willingness to work occasional evenings/weekends
- Data driven approach to impact measurement-driven

Other Duties

- Promote and develop equality and diversity in line with YMT Equality Statement.
- Actively engage in, and contribute to, own and teams' continuous professional development
- Undertake such duties of a similar nature which fall within the job purpose or within a reasonable management request
- Attend Wider Leadership team meetings and other forums as required
- Alignment with YMT values

Key Relationships

- Head of Development
- Development colleagues (Venues & Events)
- Senior Leadership Team
- Site GMs & Gardens Manager
- Senior Curators and Curators
- Comms and Marketing
- Audience Analyst

- Participation and Learning Manager
- Finance Team

External:

- Beacon CRM and other suppliers as required

Key Performance Measures

- Achievement of commercial targets (c. £100k per annum IG income), supporting YMT's financial sustainability, public programmes, and collections care
- Effective management and optimisation of expenditure budgets
- Development of sustainable long-term income streams, including legacy giving
- Informed, confident decision-making that balances income, risk, compliance, and reputation-making that balances income, risk, compliance, and reputation
- Ability to design, prioritise, and adapt fundraising products within strategic parameters
- Protection and enhancement of YMT's fundraising reputation
- Monitoring and reporting performance against budget and targets
- Effective use of insight to improve conversion, retention, and upgrade rates
- Full compliance with Fundraising Regulator and Gift Aid requirements
- Accurate consent and data management
- Delivery of a balanced, planned Patron events calendar with full January–January visibility and adherence to benefits thresholds