



Dwell Housing
Trust

Job profile – Major Donor and Legacies Manager



Background

In recent years, Dwell Housing Trust has received some significant major gifts which have enabled the building of housing for people in need. We have a strategic goal to be managing more homes and as part of this we want to create a pipeline of new build projects. Our aspirations include building 20+ homes per year for the next five years. We can only do this important work if we raise capital through donations and investments. The Dwell board and management are committed to growing income from major giving and from legacies to continue our work building more homes. This is a new role to support this work and will be a fixed term contract for one year.

Position purpose

The Major Donor and Legacies Manager will lead and develop our income generating activities within these areas; laying the foundations for future growth through the design and implementation of a strategy for both major giving, legacy fundraising and impact investment.

Key aspects of the role will include:

- taking a data-driven approach to identifying prospects from within existing networks such as supporters and regular donors.
- working with key internal stakeholders to develop cases for support and create engagement campaigns to cultivate income-generating potential.
- leveraging a range of methods to engage prospects, including face-to-face meetings; and various forms of communication, possibly including social media.
- establishing systems and processes that will also support wider prospect mapping within other stakeholder networks.

About the position

Responsible to: Chief Executive
Direct reports: None
Location: Flexible
Hours: 15 to 20 hours per week
Salary: Negotiable

Key relationships

- Dwell board, Chief Executive, other staff, volunteers and contractors

Key tasks

- Establish and manage major giving and legacy giving schemes, setting up or improving systems and processes to effectively identify, plan, engage, ask and steward donors, investors and pledgers.
- Work collaboratively with colleagues across Dwell to establish protocols for analysing regular giving data and support engagement.
- Regularly review data across a range of existing prospect segments.
- Conduct regular network mapping with trustees (including alumni) and staff to map and engage high value prospects.
- Gain insight from existing and prospective donors and work closely with colleagues to build an evidence base to define cases for support for major giving and legacies, taking into account the various motivations for donating to community housing.
- Along with Dwell's comms adviser use research to design, implement and improve donor and pledger communication and cultivation activities including (but not limited to): marketing collateral, website journeys, in-person events, meetings, e-comms, and key external campaigns.
- Develop a test and learn approach to eliciting interest and engagement, building effective, differentiated methods into campaign and comms planning.
- Effectively demonstrate Dwell's brand and values through design and delivery of campaigns/communications.
- Use Dwell's CRM database as a core part of managing major giving and legacy portfolios including ensuring relevant records are up-to-date, monitored and any insights acted upon.
- Work with colleagues to establish pledge/donation handling and financial monitoring processes for major donors and legators, including maximising tax efficiency where possible.
- Manage a budget including marketing and communications allocation.
- Ensure that our communications and practices follow Fundraising Institute of NZ best practice and ethical practice.
- Report to Dwell CE and board across an agreed reporting calendar.

Other tasks

- Be an ambassador for Dwell to external audiences as required, promoting the Dwell brand and messages, including at public events, and in interaction with stakeholders.
- Be an active contributor to staff team meetings and away days.
- Support fellow staff and provide internal mentoring and training as appropriate to ensure that the team works effectively and collaboratively in our fundraising activities.
- Adhere to Dwell's policies and procedures.
- Undertake other duties from time to time as requested the Chief Executive

Person Specification

Experience

- Experience of successfully achieving targets in a fundraising role including major giving and legacies.
- Proven ability to write to a high standard and able to communicate complex issues in a clear, compelling, and concise fashion, both orally and in writing.
- Experience in implementing and creating communications and marketing plans that have successfully increased engagement, pledges and/or donations.
- Demonstrable experience of high-quality donor care.
- Demonstrable experience of working as part of a team to achieve organisational goals.

Knowledge and skills

- Excellent interpersonal skills with external stakeholders.
- A sound understanding of relationship fundraising principles with a proven ability to develop trust and loyalty with donors and pledgers.
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- Ability to use a Contact Relationship Management System (CRM) to manage donor relationships and the 'giving cycle'.
- Ability to multi-task and work to strict deadlines with minimal supervision.
- Ability to use Office365 packages to effectively fulfil role e.g. Word, Excel, Powerpoint, Teams.

Personal

- Understanding of, and commitment to, the mission and values of Dwell Housing Trust.
- Positive, 'can do' approach to tasks.
- Ability to be flexible and adaptable to meet changing needs of the organisation.



About Dwell

Dwell Housing Trust provides affordable, quality housing for people in need or on a low income. We are more than a landlord - we ensure our tenants have access to the support they need and want to live well, do well and be well.

Building on our history and wealth of experience, we provide a range of housing services including:

- Social and affordable housing for people in need or on low incomes
- Supportive housing for people with other needs such as mental illness and intellectual disabilities
- A shared home ownership programme for first home buyers
- We also manage homes for other organisations.

We are a registered community housing provider with government's Community Housing Regulatory Authority, and we are a registered charity with Charities Services.

Our vision, mission and values | Ā mātou Tūruapō, Mīhana me Whānonga Pono

Our vision | Ā mātou Tūruapō

Well-housed communities where people live well and do well | Nahanaha whare mō te hāpori kia noho tahi hei hāpai hei ora ai

Our mission | Ā mātou mīhana

To provide affordable quality homes where people flourish | Ka whakarato ngā kainga whakaruruhau kia hāpai i ngā tangata

Our values | Ā mātou Whānonga Pono

People-centred | Pūtahi Tangata

We put people at the heart of everything we do. We are more than a landlord. We're focused on building relationships that create better lives.

Community building | Hangatanga Hapori

We help create communities where people want to live. We are inclusive and uphold human rights.

Forward thinking | Whakaaro whakamua

We are a leading organisation. We seek creative and sustainable housing, and partnerships, that help us reach our vision.

Our strategic goals

MORE Homes
Maha kainga



GREAT Services
Ka mahi ratonga



STRONG Voice
He kaha te waha



Organisational WELLBEING
Roopu whakahaere haumaru



