



## **Relationships Assistant**

### **Job Description & Person Specification**

Appointment:	Relationships Assistant – Individual Giving
Reporting to:	Senior Relationships Manager: Individual Giving
Responsible to:	Head of Community Relationships
Hours of Work:	15 hrs / week (Maternity Cover commencing June 24)
Location:	Hospice, Risley
Key Relationships:	Colleagues in community relationships team, the marketing and income generation team and financial administration; volunteers, donors, and fundraisers.

### **Main Purpose of the Job**

The Community Relationships Assistant works across all income streams, with a focus on individual giving (this includes lottery, appeals, in-memory and general donations, legacy, appeals, regular and payroll donations). They work with a Community Relationships Assistant that has a focus on community and events.

As the first point of contact for the Community Relationships team they are based at the hospice. They do lots of different things like responding to supporter queries (in person, on the phone and via email), liaising with volunteers, supporting lottery member retention and recruitment, managing stock/resources, thanking donors, and updating supporter and project records including on a CRM database. They help with donor stewardship, create fundraising resources, and work at cultivation and fundraising events; and they will support the Finance team with post and money counting as is needed.

This role gives the potential to learn and develop a variety of fundraising skills and gain an in-depth knowledge of fundraising activity and stewardship. It will provide a strong foundation for a fundraising career.

## **Role Definition**

### **Primary Responsibilities**

The post holder will work closely with Community Relationships Team to:

- Act as first point of contact for fundraising enquiries (via telephone, post, website, email, face to face), always ensuring excellent customer service.
- Assist with the onboarding and stewardship of supporters (lottery players legacy pledgers and individual donors)
- Support the administration of weekly lottery and super draw/raffles which may include processing payments, winner's cheques, renewals and cancellations, and the preparation of new members.
- Coordinate retention schemes maintaining accurate allocation and return records.
- Support the delivery fundraising and cultivation events/schemes (being involved with administration, promotion, suppliers, corporate sponsorship, on the day delivery etc)
- Assist with the production of fundraising materials, letters of authority, certificates etc.
- Maintain and monitor stocks of fundraising materials (e.g. leaflets, information packs, memory tree leaves etc) and reorder when necessary.
- Provide information for the marketing department and digital fundraising manager.
- Update project and supporter records including on Teams and the CRM database to ensure data is recorded and updated accurately.
- Support the weekly and monthly income/donor reconciliation processes to ensure cross-department accuracy of financial and supporter records.
- Provide support to fundraising projects across income generation
- Ensure filing and admin systems are kept up to date.
- On occasion, take lead role with fundraising activity/ies
- Provide cover for Relationships Assistant - Events and Community

The post holder may also provide support to Finance Team with post, counting money and financial administration.

As part of the Community Relationships Team, the post holder will be expected to attend and support talks, fundraising events, and activities.

### **Communication and Relationships**

- Talk to supporters in-person and on the phone; also communicating by email.
- At events and for some activities to lead volunteers in specific tasks
- Work closely with Community Relationships colleagues and wider Marketing and Income Generation Team
- Some contact with colleagues in other departments such as Care, Finance, HR, and Volunteering
- Participate in and contribute as appropriate to team meetings
- Use the charity's database to manage all supporter relationships ensuring all records are kept up to date
- As part of the Community Relationships Team attend speaking engagements, assemblies, and host tours of the hospice

### **Decision-making and Problem-solving**

- Carry out tasks as requested by line manager/project manager
- Seek confirmation, advice, and support from line manager/project manager
- Develop understanding and knowledge to enable personal decision making and problem solving for tasks that have been delegated

### **Training and Development**

- To show an interest in learning more about fundraising – best practise, legalities etc.
- Take a proactive role in your own continual professional development

### **Financial & Physical Resources Responsibility**

- To manage cash, standing order, direct debits, and other income in line with financial procedures
- Manage fundraising resources, advising on replenishment and costs.
- Maintain and report on costs and income for projects as required
- Count money

### **Responsibility for Information**

- Respect confidentiality regarding all issues related to Treetops' business
- Support with reconciliation of donation and supporter information
- Provide reports as requested
- Comply with GDPR and other legal and statutory requirements
- Use the charity's database to manage all relationships (both individual and organisational), ensuring all records are kept up to date

### **Working Conditions**

- As part of the Income Generation Team, you will sometimes have to work on evenings and at weekends for which time off in lieu will be granted
- Required to work longer working days on occasions
- Required to work from the office as business needs require and in line with charity guidance.

### **Physical/Mental Effort**

#### Physical

- You will be able to drive using personal car (for which appropriate insurance at own cost must be obtained)
- You may help to set up and down fundraising events and stands

#### Mental

- Able to deal with vulnerable, distressed, anxious or difficult people in accordance with Treetops' policies
- Frequently need to concentrate on a particular subject for 1 – 2 hours at a time, e.g., in meetings, when updating platforms and working on budgets
- Able to deal with a lot of interruptions and frequent switching between activities, taking calls, information requests, etc.
- Able to cope in an environment where work is managed by to key performance indicators

### **All employees are required to:**

- Comply with health and safety policies, procedures and arrangements for safe working practices

**Other**

This job description outlines the main functions and responsibilities of the post. The post holder may be required to undertake additional duties as required, commensurate with the level of the job.

**Review procedures**

There will be an annual review of the post and job contents.

**Key Performance Indicators**

Annual Key Performance Indicators will be defined by the line manager.

## COMMUNITY RELATIONSHIPS ASSISTANT

### Person Specification

	<b>Essential</b>	<b>Desirable</b>
<b>Knowledge and Experience</b>	<ul style="list-style-type: none"> <li>• Experience of working in a busy environment</li> <li>• Able to deliver excellent customer care</li> <li>• Experience of being first point of contact in person, online and by telephone</li> <li>• Able to manage personal workload to deliver tasks to several deadlines</li> <li>• Experience of MS Office programmes, including excel, word and teams; and of customer databases</li> <li>• Experience of working with money</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of lottery administration</li> <li>• Experience of working in a fundraising environment</li> <li>• Experience of standard admin/office procedures</li> <li>• Knowledge of Raisers Edge CRM</li> <li>• Knowledge of the hospice sector</li> <li>• Awareness of the work of Treetops</li> <li>• Knowledge of the wider charity environment and hospice environment</li> </ul>
<b>Communication and Relationships</b>	<ul style="list-style-type: none"> <li>• Excellent written and oral communication skills</li> <li>• Able to work as part of a team</li> <li>• Confident with telephone and face to face communications with individuals and groups of people</li> </ul>	<ul style="list-style-type: none"> <li>• Able to work with volunteers</li> </ul>
<b>Decision Making and Problem Solving</b>	<ul style="list-style-type: none"> <li>• Able make suggestions and give feedback</li> <li>• Confident in asking for help and support</li> </ul>	
<b>Responsibility for Information</b>	<ul style="list-style-type: none"> <li>• Able to handle sensitive information appropriately</li> <li>• Understanding of data protection</li> </ul>	<ul style="list-style-type: none"> <li>• Recent training on data protection and GDPR</li> </ul>
<b>Working Conditions</b>	<ul style="list-style-type: none"> <li>• Prepared to work as part of the Community Relationships team to attend fundraising activities/events as</li> </ul>	

	<p>needed (including occasional evenings and weekends)</p> <ul style="list-style-type: none"> <li>• Prepared to work from the office, community and at home as business needs require</li> </ul>	
<b>Physical/ Mental Effort</b>	<ul style="list-style-type: none"> <li>• Insured for, and able to use own car for business use (when required to use own car for work)</li> <li>• Able to deal with vulnerable and distressed people</li> <li>• Able to work efficiently from home and the office environment</li> <li>• Able to sit at computer for long periods</li> <li>• Able to lift items (set up and set down stands and events)</li> </ul>	