



Relationships Officer – Legacy & In Memory

Job Description & Person Specification

Appointment:	Relationships Officer – Legacy & In Memory
Responsible to:	Relationships Manager – Legacy & In Memory
Hours of Work:	Part-Time 16 hours (Preferably over 3 days to incl Monday)
Location:	Office Based – Treetops Hospice, Risley
Key Relationships:	Colleagues in the community relationships and the wider marketing and income generation team; support departments such as finance, HR, and facilities. Clinical managers, their staff, patients, and their careers. Suppliers, businesses (inc. funeral directors and legal firms), volunteers, will executors, donors, and fundraisers.

Main Purpose of the Job

The Legacy and In Memory Relationships Officer is a key member of the Individual Giving team. They steward our amazing donors who have chosen to leave us a legacy gift in their Will and support those who wish to make a donation in memory of a loved one.

Based at the Hospice in Risley, you will be a caring and sympathetic point of contact for supporters who visit the Hospice to donate or to see their dedicated leaf on our memory tree. You will work closely with the Relationships Manager for Legacy and In memory giving, to organise events that steward and thank our existing supporters. You will also attend internal and external opportunities in our local community to inspire others to support Treetops Hospice.

Legacy giving is such a special way to support Treetops Hospice, and we want those who choose to leave a gift in their Will to feel appreciated and to know what a huge difference their donation will make. We want to build a relationship with them, so that we can thank them in life, as well as honour them in death. You will be an integral part of this mission.

As the local hospice, we touch many lives through the care that we provide in the community and quite often, families and friends of patients that we have cared for wish to give something back to Treetops in memory of their loved one. The Relationships Officer will be the key contact for these supporters, offering a

sympathetic and listening ear whether that be face to face at the hospice or over the phone.

Role definition

Primary Responsibilities

The post holder will report to the Legacy and In Memory Relationships Manager, working closely to:

- Research, devise, and deliver campaigns that will bring significant income, develop existing and recruit new in memory donors and legacy pledgers.
- Steward donors and legacy pledgers to keep them informed, optimise their fundraising potential; listen to their feedback to improve and adapt future activity.
- Support the weekly and monthly income/donor reconciliation processes to ensure cross-department accuracy of financial and supporter records.
- Update project and supporter records including on Teams and the CRM database to ensure data is recorded and updated accurately.
- As part of the Community Relationships Team, the post holder will be expected to attend and support talks, fundraising events, and activities.
- Coordinate the delivery of stewardship events such as Make A Will Month, In Memory meet and greet, adhering to deadlines, coordinating project groups and suppliers, making decisions and problem solving with the support of the Relationship Manager and reporting results.
- Support the Relationship Manager with the delivery of campaigns and appeals.
- Provide support to existing Legacy and In Memory supporters to encourage their ongoing support.
- Represent the Community Relationships Manager and other colleagues in the department.
- Contribute to achieving or exceeding KPI's and income targets for Legacy and In Memory giving.
- Update Treetops' relationship database, manage projects on MS Teams and carry out all administration connected to the role.

Communication and Relationships

- Work collaboratively with the Relationships Manager for Legacy and In Memory, to deliver a variety of ways people can donate to Treetops and provide cover for each other as needed.
- Establish and nurture relationships with funeral directors, solicitors etc.
- Be the first point of contact for all enquiries about legacies and in-memory giving.
- Develop strong, long-term relationships with Legacy and In Memory supporters through regular telephone and face-to-face contact, communications, networking, written updates, and other feedback as appropriate.
- Provide excellent relationship management to ensure donors receive the highest standard of customer care.
- Co-operate and liaise with departmental and inter-departmental colleagues.
- Host supporters at the hospice, and deliver talks

- Work closely with colleagues in the Community Relationships team to deliver fundraising plans
- Participate in and contribute as appropriate to team meetings

Decision-making and Problem-solving

- Make decisions about the tasks delegated to you, referring to the Legacy and In Memory Relationships Manager
- Prioritise activities to generate the most charitable income.

Training and Development

- Show an interest in new developments and best practice within in memory and legacy fundraising
- Stay informed about legalities and codes of conduct in the wider fundraising sector
- Take a proactive role in your own continual professional development

Responsibility for Information

- Use the charity's database to manage communications and all donor relationships, ensuring all records are kept up to date.
- Respect confidentiality regarding all issues related to Treetops' business.
- 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 predominantly from the office but occasionally out in the community as business needs require and in line with charity guidance.
- Required to work longer working days on occasions

Physical/Mental Effort

Physical

- Able to drive using personal car (for which appropriate business insurance at own cost must be obtained)
- Able to erect/dismount marquee, lift display and promotional materials

Mental

- Able to speak to people and attend events with people who do not know you
- 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 working on budgets or developing new fundraising initiatives
- Able to deal with a lot of interruptions and frequent switching between activities, meeting different people, taking calls, information requests, etc.
- Able to cope in an environment where work is managed 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 Legacy and In Memory Relationships Manager.

Relationships Officer – Community Engagement
Person Specification

	Essential	Desirable
Knowledge and Experience	<ul style="list-style-type: none"> • Proficient in providing excellent customer service. • Track record in maintaining motivating and stewarding people in person, over email and telephone; and in hosting groups of people. • Experience of negotiating contracts and costs • Previous success in delivering results against set targets. 	<ul style="list-style-type: none"> • Experience of fundraising, specifically in memory and legacy income streams and campaigns • Expert in categorising donors • Experience of identifying strong reasons to give and writing for different audiences. • Proven track record in successful charity fundraising • Good understanding of other areas of fundraising • Excellent knowledge of fundraising and event operational procedures (e.g. health and safety, financial, volunteer etc.) • Experience of fundraising platforms • Track record of giving assemblies and talks. • Knowledge of the wider charity environment and the hospice sector • Well versed in the Code of Fundraising Practice • Knowledge of Raiser's Edge or similar CRM database • Awareness of the work of Treetops • Lives in Derbyshire or Nottinghamshire (area served by Treetops)
Communication and Relationships	<ul style="list-style-type: none"> • Able to negotiate, persuade, motivate, and encourage. • Excellent written and oral communication skills 	

	<ul style="list-style-type: none"> • Knowledge and demonstrable experience of producing high quality written work and presentations. • Excellent networking skills, ability to develop strong relationships. • Expert with chatting to and building relationships with service users and donors over the phone/SMS. • Proactive, demonstrating a high level of initiative. • Able to work as part of a team. 	
Time Management	<ul style="list-style-type: none"> • Able to manage workload, assign priorities, and maintain focus on productive endeavours. • Methodical, does things carefully, thoroughly, in order and on schedule. • Efficient makes optimal use of the time available. • Seeks support when needed 	•
Pursuit of Excellence	<ul style="list-style-type: none"> • Has pride in personal performance and has high personal standards of work? • Deals with poor performance issues when problems arise. • Seeks feedback on own performance and examines personal strengths and weaknesses. • Shows commitment to identifying training and development needs and takes the initiative in addressing them 	•
Decision Making and Problem Solving	<ul style="list-style-type: none"> • Able to work independently on set tasks • Confident in asking for support 	<ul style="list-style-type: none"> • Able to schedule work against the charity's priorities and return on investment

	<ul style="list-style-type: none"> • Happy to answer queries knowing when to defer /go back later • Willing to contribute to discussions and decision making • Able to consider data and how this will impact on a fundraising activity 	
Social Responsibility	<ul style="list-style-type: none"> • Acts in a manner that is beneficial to the hospice and the wider community, not solely to the individual 	
Responsibility for Information	<ul style="list-style-type: none"> • Able to handle sensitive information appropriately • Able to update and maintain records on database • Does things carefully, thoroughly, in order and on schedule. 	
Working Conditions	<ul style="list-style-type: none"> • Prepared to work on occasions, early mornings, weekends, and evenings • Prepared to work as part of the Community Relationships team to attend fundraising activities/events as needed • On occasions, spends time working in the community 	
Physical/ Mental Effort	<ul style="list-style-type: none"> • Insured for, and able to use own car for business use (when required to use own car for work) • Ability to undertake computer based activity • Able to deal with vulnerable and distressed people • Able to walk into a room of people who do not know you and engage with them • Able to lift display and promotional materials, set up for events 	