



RELATIONSHIPS MANAGER – IN MEMORY AND LEGACIES

Job Description & Person Specification

Appointment:	Relationships Manager – In Memory and Legacies
Responsible to:	Head of Community Relationships
Hours of Work:	Full Time 37 hours
Location:	Hybrid - A mix of working from the office with some time at home and in the community
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 Relationships Manager for Legacies and In Memory is our 'go to' person for individuals wishing to donate to Treetops through leaving a gift in their Will or by donating in memory of someone. This person will work as a team to ensure that KPI income generation targets are met. They will work with the Relationships Managers for Appeals, Community and Lottery to ensure we offer appropriate ways for people to donate. Together they help to support our major donor programme.

In this role they develop campaigns to secure legacy bequest and in memory donations, organise cultivation, information and will clinic events, work with businesses including solicitors, funeral directors, and crematoriums, and manage a budget.

They work with our Digital Fundraising Manager and marketing team to create materials, design online and direct mail campaigns that will attract new and develop existing support. This means they know what influences this type of giving and can write for the different audiences. Most importantly, they will steward donors, so they feel valued and want to give again.

Role Definition

Primary Responsibilities

The post holder will:

- Research, devise, and deliver campaigns that will bring significant income, develop existing and recruit new in memory donors and legacy pledgers.
- Ensure all campaigns and appeals are strategically planned, in terms of clear objectives, activity, recruitment, marketing, PR and donor care plans.
- Manage the delivery of campaigns and appeals adhering to deadlines, coordinating project groups and suppliers, taking decisions and problem solving and reporting results.
- Achieve or exceed the supporter number and income targets.
- Steward donors and legacy pledgers to keep them informed, optimise their fundraising potential; listen to their feedback to improve and adapt future activity.
- Manage the in memory and legacy budget, signing of expenditure, negotiating contracts, and taking responsibility for the relationships with contractors such as Smeed and Ford.
- Provide expert advice to colleagues within the marketing and income generation team in support of shared objectives.
- 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.

Communication and Relationships

- Work collaboratively with the Senior Relationships Managers including Lottery, to deliver a variety of ways people can donate to Treetops and provide cover for each other as needed.
- Work with the marketing team and Digital Fundraising Manager to agree design, messaging, and marketing channels to increase income from in memory and legacy activities; and enhance public awareness of Treetops.
- Establish and nurture relationships with funeral directors, solicitors etc.
- Be the main point of contact for all enquiries about legacies and in-memory giving.
- Provide excellent relationship management to ensure donors receive the highest standard of customer care.
- Co-operate and liaise with departmental and inter-departmental colleagues.
- Participate in and contribute as appropriate to team meetings.
- As part of the Community Relationships Team attend speaking engagements, assemblies, and host tours of the hospice.

Decision-making and Problem-solving

- Undertake data analysis to assess the performance of activity and apply the findings to influence plans.
- Prioritise activities to generate most charitable income.
- Make decisions with regards to own specialism and in the context of the departmental and organisations goals and objectives.

Training and Development

- Keep up to date on best practice within the charity sector with a focus on in memory and legacies, highlighting trends and insight that could inform planning.
- Keep up to date with new developments, legalities, codes of conduct and best practice within in memory and legacies, as well as the wider fundraising sector.
- Take a proactive role in your own continual professional development.

Financial & Physical Resources Responsibility

- Ensure income generation targets are met.
- Be accountable for the efficient management of both income and expenditure relating to responsibilities.
- Contribute to budget setting and financial forecasting.
- Have oversight of resources to ensure campaigns and appeals are resourced.

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.
- Give strategic advice concerning responsibilities.
- 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 will be able to set up/down fundraising events and stands (a marquee, tables and displays etc).

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 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 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.

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Person Specification

	Essential	Desirable
Knowledge and Experience	<ul style="list-style-type: none"> • Proven track record in successful charity fundraising. • 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. • Demonstrable experience of managing projects and balancing multiple critical priorities; setting milestones and targets; directing colleagues; and managing budgets 	<ul style="list-style-type: none"> • Experience of developing and managing in memory and legacy income streams and campaigns • Expert in categorising donors • Experience of identifying strong reasons to give and writing for different audiences. • 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 recruiting and managing volunteers • 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 • Knowledge of the wider charity environment and the hospice sector • Lives in Derbyshire or Nottinghamshire (area served by Treetops)
Effective Communication	<ul style="list-style-type: none"> • Able to negotiate, persuade, motivate, and encourage. • Excellent written and oral communication skills • Knowledge and demonstrable experience of producing high quality 	<ul style="list-style-type: none"> • Trained in relationship management

	<p>written work and presentations.</p> <ul style="list-style-type: none"> • 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. • Confident to challenge appropriately. • Experience of building internal and external partnerships 	
Cooperation	<ul style="list-style-type: none"> • Alert to opportunities to use own expertise and experience to help others. • Understands the benefits of teamwork. • Thinks through implications of actions on others; supports and encourages positive behaviours. 	
Decision Making and Problem Solving	<ul style="list-style-type: none"> • Ability to research and write business cases for proposed activity. • Able to take responsibility at events, to 'think on your feet' and make decisions autonomously 	<ul style="list-style-type: none"> • Able to schedule work against the charity's priorities and return on investment
Responsibility for Information	<ul style="list-style-type: none"> • Highly numerate with the ability to understand and investigate complex information to simplify and present it to a range of audiences. • Able to research and write business cases for proposed activity. • Able to handle sensitive information appropriately, updating records on database. 	<ul style="list-style-type: none"> • Recent training on data protection and GDPR

	<ul style="list-style-type: none"> • Does things carefully, thoroughly, in order and on schedule. 	
Change Orientation	<ul style="list-style-type: none"> • Adapts rapidly to changed circumstances and priorities. • Seeks new approaches to situations/difficulties. • Responds constructively in situations of change that appear ambiguous and contradictory. 	
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, able to delegate and project manage 	
Pursuit of Excellence	<ul style="list-style-type: none"> • Has pride in personal performance and has high personal standards of work? • 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 	
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 	
Working Conditions	<ul style="list-style-type: none"> • Works occasions, early mornings, weekends, and evenings • Works as part of the Community Relationships team to attend fundraising 	

	<p>activities/events as needed.</p> <ul style="list-style-type: none">• 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)• Able to sit at computer for long periods.• 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 marquee and equipment for events	