

Job Description

Relationship Manager (Wills & Legacies)

POST:	Relationship Manager (Wills & Legacies)
HOURS:	Minimum 22.5 hours per week (Home/office based)
CONTRACT:	Permanent
ACCOUNTABLE TO:	Director of Income Generation
REPORTS TO:	Director of Income Generation

JOB PURPOSE

The Relationship Manager will be responsible for developing and implementing a legacy strategy for St John's Hospice. This will involve delivering campaigns to recruit and retain legacy supporters whilst establishing a robust marketing programme to fully realise the potential of this income stream.

In addition, you will work to understand and maximise on legacy conversations with key audiences working with a wide range of stakeholders to create an effective legacy culture. You will be responsible for ensuring notifications of legacy gifts are dealt with effectively, in order to achieve annual income targets. This role will involve working collaboratively across all directorates to raise the profile of the hospice and secure the wellbeing of patients, carers and their families

KEY WORKING RELATIONSHIPS

Fundraising Manager
Supporter Care Manager
Director of Marketing, Communication and Engagement
Chief Executive
Senior Management Team
Heads of Departments
Trustees
Staff & Volunteers
Commercial, statutory & voluntary organisations
Hospice supporters
Public

MAIN DUTIES

- Full responsibility for the ongoing development of the legacy strategy and its implementation.
- To develop, execute and monitor Legacy Fundraising operational plans and manage the Legacy budget.
- Be responsible for devising and implementing on-going initiatives which continue to maximise legacy income to the Hospice.
- Network extensively with solicitors and funeral directors building positive relationships in order to encourage support for the Hospice.

- To significantly increase the number of legacy pledgers ensuring accurate recording whilst utilising the hospice database (Donorflex).
- To work alongside the Supporter Care team to help shape and implement an appropriate supporter journey for legacy pledgers.
- To provide written and verbal reports on legacy fundraising, including clear, accurate and realistic financial updates and forecasts.
- To monitor performance against budget and where appropriate against external benchmarks, and to ensure that all aspects of Legacy Fundraising are carried out in the most cost effective and efficient way.
- Work with executors in a professional and approachable manner seeking to maximise gifts when appropriate, and engage with the professional audience to generate future interest in legacy giving.
- Ensure gifts in wills are managed sensitively and in accordance with all relevant legislation and internal practices.
- Act as the first point of contact in legacy case matters for organisations staff, professionals and members of the public.
- To develop a living legacy proposition as part of the continued development of hospice supporters.
- Be responsible for developing an annual "Gifts in Wills" programme and a 'Continuous wills giving scheme' to ensure wills are readily available for supporters.
- Ensure that accurate recording and high standards of administration are maintain.
- Work closely with fundraising colleagues and Director of Income Generation in order to maximise any potential legacy income from supporters.

General Duties

- Develop and maintain an up to date comprehensive understanding of the wide-reaching work of St John's Hospice.
- Be aware of the overall activities of the Hospice and represent the Hospice at functions when necessary.
- Work closely with the Head of Communications, Marketing and communications on promotions, publicity, public relations and advertising in relation to articles and information for the newsletter, website and other communications tools.
- Maintain and develop good relationships with volunteers
- Keep an accurate and up to date database with records of all legacy communications
- Carry out any other duties as requested by the Director of Income Generation

People and departmental management

- To share ideas and opportunities with other members of the Income Generation team and to identify and research new activities.
- To have responsibility for risk assessments for all activities as required and act responsibly in relation to health & safety.
- To respond to all enquiries in a timely manner.
- To promote the hospice and its work to external organisations and members of the general public
- Use own initiative to manage work volumes and prioritise workload. Accountable to the Director of Income Generation who will provide management support.
- Work is a mix of supervised and unsupervised activities with a degree therefore of self-checking. Responsible for ensuring that workloads and deadlines are managed effectively.
- To work hours as designated and agreed with the Director of Income Generation
- To comply with all relevant legislation
- Driving within local community is an essential part of this role. Own transport needed to attend external events and appointments with business insurance required on own vehicle
- Physical demands in relation to some activities, expected to be a fully active member of the team.

- Setting up at venues will involve carrying equipment/materials up to approx. 10 kilos.
- PC work – hand and wrist dexterity and use of VDU
- A balance of home and office working is an option for this role to meet the needs of the hospice.
- Occasional evening/weekend, Bank Holiday and lone working

Other Duties

The responsibilities set out in this document may change from time to time through discussion with the post holder. In addition, the post holder might, at the discretion of the Senior Management Team, be required to take on other tasks in the wider interests of the hospice.

STANDARD/ENHANCED DISCLOSURE REQUIREMENT

Enhanced Disclosure

DUTIES AND RESPONSIBILITIES TO ST. JOHN'S HOSPICE

1. Confidentiality

Each member of the Hospice staff is responsible for ensuring the confidentiality of any information relating to patients, personal information relating to staff, volunteers, supporters, visitors or contractors, financial information, commercial information, and for complying with all the requirements of the Data Protection Act and Caldicot Guidelines whilst carrying out the duties of the post. Any breaches in Hospice confidentiality will be dealt with by St. John's Hospice Disciplinary Procedure and may result in dismissal.

2. Health and Safety

Each member of the St Johns Hospice staff is responsible for ensuring that they carry out the duties of their post in accordance with all appropriate Health and Safety legislation, guidance and procedures and they do not, by any act or omission on their part, create a threat to the Health and Safety of any other person.

3. External Interests

Each member of the St Johns Hospice staff is responsible for ensuring that any external interest they have do not conflict with the duties of their posts and they must disclose the external interest if this is likely to occur, or if they are in doubt about a possible conflict with their work. Each member of staff is reminded to refer to their employment contract in relation to any other secondary work that they may do alongside working for St John's Hospice and their obligations under the Working Time Directive.

4. Statutory Training

Each member of the St Johns Hospice staff has a statutory obligation to attend mandatory training. It is the responsibility of each member of staff to ensure that they comply with this legal requirement.

5. Flexibility

This job description is intended to act as a flexible guide to the duties of the post and therefore will require revision in consultation with the post holder to reflect the changing requirements of the post, to enable the St John's Hospice to achieve its corporate goals and objectives.

6. Safeguarding

Each member of St John's Hospice staff is responsible for understanding their responsibilities for Safeguarding Children and Vulnerable Adults in accordance with their job role and any requirements they are obliged to follow as members of their profession. Staff should seek guidance from their immediate supervisor if in doubt.

7. Disclosure and Barring

Each member of staff is required to disclose any caution, fine, penalty or criminal conviction that may occur during the course of employment. This should include any motoring convictions as this may affect the staff member's ability to use Hospice vehicles. Any change in circumstance must be reported immediately to the staff member's supervisor so that any impact on ability to work in post can be assessed.

8. Equality and Inclusion

Each member of staff is required to undertake their duties with due regard for the provisions of the Equality Act 2010 i.e. not to discriminate against members of staff, patients, patient family members, volunteers, supporters, contractors and any visitors to the Hospice.

9. Volunteers

The role of volunteers is integral with the work of St John's Hospice and paid staff are required to underpin this in their attitude and actions.