



Senior Fundraiser – In memoriam and legacy giving

Job Description & Person Specification

JOB TITLE:	Senior Fundraiser
SALARY:	£26,000
HOURS:	37.5 hours
RESPONSIBLE TO:	Charity Chief Executive
ACCOUNTABLE TO:	Fundraising Manager
LOCATION:	Flexible. Will include office working at any of our four hospital sites - Queen Elizabeth Hospital Birmingham, Heartlands Hospital, Good Hope Hospital, Solihull Hospital and opportunity for some home working as suits the job holder and line manager. If candidates have a preference to work at any particular site please state this in your covering letter.

KEY WORKING RELATIONSHIPS

Internal: Fundraising Manager, Fundraising Officers, Fundraising Assistants, Communications Officer, Administrative Officer, Charity Grants Officer, Head of Fundraising, Director of Fundraising, Charity Chief Executive

Chairman and Board of Trustees, Communications Department, Hospital Executive Management Team

Consultants, Nursing staff, Clinical staff, Royal Centre for Defence Medicine staff, Medical Secretaries, Administrative Staff

External: Fundraisers, donors, supporters, volunteers, corporate sector, community groups, events management, Association of NHS Charities, BBC, ITV, national and local media outlets

WHO WE ARE

University Hospitals Birmingham Charity consists of four hospital charities supporting some of the busiest hospitals in Birmingham – Queen Elizabeth Hospital Birmingham, Heartlands Hospital, Good Hope Hospital and Solihull Hospital.

The Charity is dedicated to improving the experience of patients, their families and the staff who care for them.

UHB Charity raises funds to support patients of the four hospitals by providing new and innovative equipment, funding research and supporting patient and family welfare projects.

The Queen Elizabeth Hospital Birmingham in particular has a world class reputation, and specialises in cancer treatment, organ transplantations and trauma care. It is also home of the Royal Centre for Defence Medicine, where the UK's military patients are treated.

Heartlands Hospital has a specialist neo-natal unit and very busy children's and maternity units.

Good Hope Hospital and Solihull Hospital serve the towns of Sutton Coldfield and Solihull.

JOB SUMMARY

This is a full time post in the Fundraising Team at University Hospitals Birmingham Charity ('UHB Charity'), the official NHS Charity for the four hospitals of University Hospitals Birmingham NHS Foundation Trust - Queen Elizabeth Hospital Birmingham, Heartlands Hospital, Good Hope Hospital and Solihull Hospital.

The post offers the opportunity for office working at any of our four hospital sites with the opportunity for some home working as suits the job holder and line manager.

The Senior Fundraiser will work closely with other members of the hospital charity, and will be responsible for developing and delivering the Charity's in memoriam and legacy giving programme.

The post is suitable for someone with a minimum of 12 months experience in fundraising.

PRINCIPAL DUTIES

- Create a sustainable legacy pipeline for UHB Charity and to ensure that legacy income increases and continues to be a strong element of our voluntary income.
- Build and maintain strong relationships with those leaving gifts in memory including thank you events for these supporters.
- Be the first point of contact for all enquirers about in memory giving and gifts in wills for all supporters, patients and families.
- Plan, develop and deliver an In-memoriam action plan which will maximise future income
- Organise and execute events to raise awareness about leaving a legacy to the Charity as part of the legacy stewardship plan.
- Act as an ambassador for legacy marketing, ensuring all stakeholders are aware of the importance of legacies to the organisation.
- Develop and implement the 'Will Month' campaign and oversee on-going and new relationships with local solicitors and develop materials for them to promote legacy giving to the Charity.
- Devise and manage appropriate donor journeys and accompanying communication plans for legacy pledgers and develop donor profiles to better understand the profile of potential legators.
- Shape, plan and deliver a cross – organisational legacy action plan which will maximise future income.

- Engage in other areas of fundraising where there are opportunities to meet supporters and/or volunteers to help promote legacy giving and build relationships.
- Working alongside the finance team to report on legacy income, pipeline and to liaise with solicitors and executors of estates.
- To work with and deliver clear objectives and key performance indicators.
- To proactively contribute to the achievement of targets and the ongoing fundraising success of the Charity as a whole and to be a supportive, effective and integrated team member.

FUNDRAISING DEVELOPMENT

The post holder will develop and implement the Legacy and In-Memoriam fundraising strategy in association with the Director of Fundraising and under the direction of the Charity Chief Executive, in line with the Strategic Plan and annual operating plans:

- to create achievable but stretching financial income targets for the year
- to identify and recruit new supporters and develop relationships with existing supporters, adhering to service standards designed to ensure optimum supporter care
- to build relationships with the relevant clinical teams across the Trust to ensure everyone understands the importance of legacy income to the Charity and their role in supporting our strategy
- to build relationships with the relevant clinical departments who will actively be involved in our In-Memoriam fundraising strategy
- to work in partnership with other fundraising colleagues to maximise opportunities in pursuit of the Charity's objectives.

ADMINISTRATIVE

The post holder will ensure that detailed administration is executed to ensure rigorous and thorough tracking and record keeping on the database:

- by monitoring and evaluating approaches and responses.
- by sending applications for support in a timely manner, complying with the deadlines set by the organisations or individuals concerned.
- to maintain accurate records of activity and income, including the preparation of financial and status reports, and using the fundraising database.
- handling calls and correspondence from supporters in line with Charity policy.
- sending thank you letters and receipts to donors within agreed timescales and updating the fundraising database.
- paying donations into the Charity via cashiers office.
- to ensure all relevant information about supporters and potential supporters is promptly and accurately recorded on to the database in keeping with data protection protocols and to carry out administration tasks including issuing letters of authority and permissions, thank you letters, collectors licences.
- to work with online fundraising channels and providers such as Just Giving to increase income.

INFORMATION MANAGEMENT AND RESEARCH

There will be a regular requirement for the post holder to use a variety of software to produce reports on current and prospective supporters and decision makers. The post holder will be responsible for developing written communications material and using desk top publishing software to produce publications, presentations and reports:

- using available resources such as web, information disks and directories.
- assessing and acting upon intelligence gained from within the patient, member, staff and colleague networks.
- developing individual approach strategies for each target individual, group or company.
- to attend appropriate events, training, networking, and information gathering events as a means of adding to the Charity's knowledge of decision makers and influencers.
- to carry out the necessary research to ensure that applications to companies, individuals and community groups are of the highest quality and detailed in the most tailored way to maximise chances of success.
- to research companies through desk-based activity seeking out their preferences for charitable support and submitting outstanding and timely submissions for companies in relation to charity of the year applications, ensuring the document is compelling and relevant to the business in question.
- to research community groups through desk-based activity seeking out their preferences for charitable support and submitting outstanding and timely submissions for companies in relation to charitable approaches for adoption, ensuring the document is compelling and relevant to the group in question.

INTERNAL COMMUNICATION AND RELATIONSHIPS

The post holder will work under the direction of the Director of Fundraising, Senior Fundraising Manager and Charity Chief Executive to liaise with relevant departments to gather information in support of identified and pre-approved projects for external bids:

- to liaise with hospital staff to gather information on the projects which it has been agreed to be funded and to match the elements of the project to supporters and prospects.
- to work with established fundraisers within the hospital.
- to establish relationships between hospital and Charity staff and external supporters and decision makers.
- providing briefings for hospital and Charity staff to prepare them for meetings with external prospects, ensuring they are well briefed and informed as to the supporter's preferences.

EXTERNAL COMMUNICATION AND RELATIONSHIPS

- to develop the relationship with in-memoriam supporters or legators, including through telephone contact, site-visits, enlistment and cultivation events, acknowledgement events, and meetings.
- to negotiate opportunities for donor recognition.
- to submit detailed reports to supporters in line with their expectations and requirements and to ensure commitments are fulfilled in a professional manner.
- to foster and steward long-term relationships with donors and supporters, including update reports, site visits, and communication of key milestones.
- to prepare publicity and communication materials for the relevant fundraising projects
- to identify people of influence and to work with them productively, professionally and sustainably in support of the charity's appeals and campaigns.

- to increase awareness of the QEHB Charity through various communication channels; including traditional media such as the press and radio, internet and face to face contact.

MISCELLANEOUS

- to represent the Charity in a variety of different contexts and to a variety of different audiences.
- to maintain a current and up to date knowledge of changes in legislation affecting charities and carry out fundraising activities in line with Institute of Fundraising Codes of Conduct.
- to ensure that a positive image of the hospital and the Charity is projected at all times.
- to hold a flexible approach to working hours (the role will require the post holder to work evenings and weekends as necessary).
- to hold a flexible approach to work when asked to take on other fundraising or admin duties when the team needs to cover holidays, or at times of workload pressure.
- to adopt a supportive and collegiate approach when working with the fundraising team and other colleagues within the hospital.

The Senior Fundraiser will also carry out other projects and duties as directed by the Director of Fundraising and Charity Chief Executive.

ADDITIONAL DUTIES:

As a member of the Charity team, the Senior Fundraiser will be required to contribute to the day-to-day work of the Charity. Duties are likely to include responding to telephone enquiries from hospital staff, donors, fundraisers, media and external organisations and covering other members of the team as directed by the Charity Chief Executive.

NOTES:

This is not intended to be an exhaustive list of responsibilities but more an outline framework against which the post holder will be given flexibility to define the detail. Any changes will be the subject of consultation with the post holder.

All employees must adhere to and perpetuate Charity Policies and Procedures relating to:

- Health and Safety
- No Smoking at Work
- Equal Opportunities in Employment, including responsibilities under the Disability Discrimination Act.

Your attention is drawn to the confidential nature of information collected within the NHS. The unauthorised use or disclosure of patient or other personal information is a dismissible offence and in the case of computerised information could result in a prosecution for an offence or action for civil damages under the Data Protection Act 1984.

Please note that employees are employed directly by the Charity and not the NHS.

Employees do not have access to the NHS Pension Scheme.

Employees of the Charity are eligible to join a defined contribution pension scheme, to which the Charity will contribute 8% of an employee's annual salary in addition to employee contributions.

Employees of the Charity are eligible for enhanced maternity and sickness pay.

Senior Fundraiser

Person Specification

Competence	Essential	Method of Assessment
Education and qualifications	GCSE English Language or equivalent	Application
	GCSE Mathematics or equivalent	Application
	Desirable	
	Educated to degree level or equivalent	Application
	Qualification in legacy fundraising, in – memoriam fundraising, communications, PR or marketing	Application
	Membership of the Institute of Fundraising	Application
Experience	Experience in legacy and/or in – memoriam fundraising gained in a charitable environment	Application/Interview
	Experience of presenting to large audiences/groups	Application/Interview
	Experience of producing charity fundraising appeal materials	Application/Interview
	Demonstrable success of securing significant income and of achieving challenging financial targets	Application/Interview
	Knowledge/experience of fundraising in a health related field	Application/Interview
	Demonstrable experience and knowledge of the latest donor development techniques	Application/Interview
	Experience of delivering fundraising targets with community groups	Application/Interview
	Desirable	

	Car driver	Application/Interview
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