

**JOB DESCRIPTION**

<b>JOB TITLE:</b>	<b>Legacy &amp; Tribute Manager</b>
<b>BAND:</b>	<b>6</b>
<b>SALARY:</b>	<b>£37,338 - £44,962</b>
<b>HOURS:</b>	<b>37.5 Hours with some out-of-hours working</b>
<b>PLACE OF WORK:</b>	<b>Flexible/ Agile working with 50% time-based in the office</b>
<b>TYPE OF CONTRACT:</b>	<b>Permanent</b>
<b>DEPARTMENT:</b>	<b>RUHX – Charity Team</b>
<b>SPECIALITY / DIVISION:</b>	<b>Strategy Directorate</b>
<b>RESPONSIBLE TO:</b>	<b>Head of Development</b>

**JOB SUMMARY:**

**At RUHX, we're more than a hospital charity.**

We go further to give every patient the extra extraordinary care they deserve, while supporting our staff to do what they do best and furthering innovation within our hospitals. We're out there in our community, collaborating with the people and organisations who drive real change. And we're making sure that every penny we raise goes towards improving health, happiness and wellbeing for everyone in Bath and beyond.

**We are RUHX. And together, we have the power to do more.**

We're the official NHS charity of the Royal United Hospitals Bath – The X stands for the extra extraordinary work that our staff, volunteers and supporters do to make our place healthier and happier for everyone. Our charity values are important to us, making sure we are all working towards the same goals, they shape our team culture and are in the DNA of all we do.

- **Creating comm-unity** - We're here to bring people together – to build trust, inspire others, and share all we have. We're a charity built on empathy and compassion and putting the needs of real people first. Together, we can do more.
- **Positively disruptive** - If the rules aren't helping us to make our place healthier and happier for everyone, we're not afraid to challenge them. We're brave, bold and ready to shake things up if it means making a difference.
- **Science with heart** - As a hospital charity we talk a lot about health conditions, research, technology and science – but that doesn't mean we leave out the real people at the heart of it all. We bring out the human element in every story.

- **Exchange (Giving and taking)** - We're here for the people at the heart of our diverse community. That's why, whether it's our staff or our supporters, we're committed to giving back as much as we welcome in – promoting equality and inclusivity across all we do.

## **Development background**

We are committed to securing gifts in wills and charitable income to support staff and patient services at the RUH. The five key areas we support are medical equipment, patient and staff support, medical research, capital campaigns, and 'where the need is greatest'. Our successful fundraising efforts are built on lasting relationships with the local community, charity events, and individual supporters.

Our track record speaks for itself. We have effectively executed charitable projects and secured significant historical fundraising income, including a £10 million contribution to the £50 million Dyson Cancer Centre, set to open in Spring 2024. Other successful projects include the Dyson Centre for Neonatal Care, the RNHRD and Brownsword Therapies Centre, the Robotic Surgery campaign, Cardiovascular Research, and the Breast Unit redevelopment, among many others. As we plan our next major campaign, the post holder will be crucial in securing gifts in wills as part of the Development team and contributing to the campaign's successful delivery.

## **Why the City of Bath?**

Our offices are centrally located within the hospital site in the World Heritage City of Bath—a place rich in history and surrounded by stunning scenery. Nestled in the Somerset countryside, Bath is home to iconic landmarks such as the Roman Baths, The Royal Crescent, and The Circus. Beyond its historical significance, Bath serves as a dynamic hub for business and innovation, attracting some of the world's most renowned and wealthy entrepreneurs, philanthropists, and business owners.

With a thriving business community, outstanding educational institutions, beautiful surroundings, and a growing tech sector, Bath offers ample opportunities to develop networks and enhance RUHX's charitable income. In addition to developing nationwide prospects, the city offers direct transport links to major cities such as London, Bristol, the rest of the UK and Europe- perfect for donor meetings and flexible working.

## **JOB SUMMARY: Legacy and Tribute Manager**

The Legacy and Tribute Manager will be passionate about building relationships with individual supporters and their families. You will need a background in legacy marketing and administration. You will need to feel comfortable with promoting this critical area of fundraising and be prepared to emotionally engage with / invest in relationships with supporters and their families.

In this role, you will be pivotal in our Development Team, directly reporting to the Head of Development. This post collaborates with the Individual Giving Officer on the In Memory strategy to maximise In Memorium support by communicating with supporters, arranging appropriate events, and uplifting donors to increase support as part of the Legacy and Tribute Funds programme.

The post holder will be expected to work closely with the Associate Director of RUHX, other RUHX team members and senior corporate / clinical functions within the Trust to deliver support from Legacy, Tribute Funds and In Memorium. This includes developing robust project plans, case documents, tailored proposals and effectively managing a dynamic pipeline of prospective donors to help achieve significant income growth from gifts in will and tribute funds in line with our fundraising strategy.

The post holder requires experience building and maintaining effective relationships with high-level individuals, the ability to work on multiple projects, and the ability to interpret a broad range of policy and strategy with minimal guidelines. In addition, the post holder must have sound knowledge of the legal processes and procedures that cover the management and administration of Wills/legacies by the legal profession.

## **MAIN DUTIES & RESPONSIBILITIES:**

### **1. Strategy Development**

The post holder will be responsible for leading, implementing and managing the delivery of:

- The Legacy (Gift in Wills) & Tribute Fund fundraising strategy and policies
- Mechanisms for Legacy engagement
- Donor stewardship to maintain / retain support

The post holder will work closely with the Associate Director RUHX and Head of Development, Finance Team, Charity Committee Members to develop the management of the following processes:

- Proactively leading, developing, implementing and evaluating the Legacy (Gift in Wills) & Tribute Fund strategy aimed at raising support for a range of funding needs including:
  - Major fundraising campaigns
  - Secondary campaigns
  - Ward & department needs
  - Research
- Identifying and proposing strategy changes / developments to the Head of Development
- Devising and implementing a Legacy (Gift in Wills) & Tribute Fund income plan which clearly shows activity / results to achieve required income targets against a target of c£1.2m per year.
- Devising and implementing appropriate research / prospect pool / gift assessment / motivation / solicitation techniques and strategies to engage individual donors and families for the benefit of the RUHX / RUH.
- Delivering Legacy (Gift in Wills) & Tribute Fund income targets within the fundraising strategy as agreed by Associate Director RUHX, Head of Development and the RUH Charities Committee.
- Devising and implementing a cost effective programme budget for Legacy (Gift in Wills) & Tribute Fund work, providing value for money with expenditure controlled within agreed limits.

- Work as part of the Development Team to ensure the effectiveness of RUHX work in this area, and provide support to other members of the team as required.

## **2. Fundraising & Supporter Liaison**

The post holder will be responsible for leading, implementing and managing the delivery of:

- The research, documentation, editing and compilation of cases for charitable support within the RUH (major campaigns and other) that will be of interest to prospective donors, together with the development of compelling proposals to secure funding.
- Working with fundraising committees, consultants, project teams, senior clinical staff, Trust Board members and individual supporters to research, and gather intelligence on, appropriate prospects for 'Legacy' support. Provide fundraising and communications advice in respect of Legacies to RUH management, committees and other staff.
- Ensuring the value of Legacy bequests is maximised by working with families and solicitors.
- Developing and implementing robust supporter communications for Tribute Fund donors and Legacy contacts to maximise the relationships and income. In particular, developing strong links with solicitors, FT members, community groups and families of patients across the RUH catchment, to both promote RUHX / RUH as a beneficiary and to maximise the impact of initiatives such as RUH Will Month.
- Developing and delivering a programme of Legacy events to lift the profile of the charity with potential legators and their advisers. This will include researching venues, planning and hosting the event and presenting on Will-making and legacies, following up on prospects generated.
- Responding to approaches / requests from prospective donors and corresponding effectively and persuasively with them and supporter networks etc using, verbal, face to face and electronic communications.
- Securing, building and maintaining excellent relationships with Legators and Tribute Fund holders to ensure regular contact maintained and income targets are met.
- Managing the legacy 'pipeline', identifying peaks and troughs and implementing actions to 'smooth' income where possible.
- Working collaboratively with Individual Giving Officer to research In Memorium supporters and seek to uplift to Tribute Funds or Legacy prospects where applicable.
- Collaborating with Individual Giving Officer on the Fundraising Strategy regarding In Memorium supporters, communicating with, and arranging appropriate events to maximise Legacy and Tribute Fund support.

## **3. Communication and Relationships**

The post holder will be responsible for leading, implementing and managing the delivery of:

- The provision of communications in collaboration with the Marketing Team and Projects Co-ordinator ensuring the charity brand is consistent across all channels and distribution maximised.
- Utilising internal and external networks to present projects and achieve Legacy (Gift in Wills) & Tribute Fund fundraising success, often working in complex / sensitive situations where co-operation and agreements to support are being sought.

- Liaison with senior clinicians and other parts of the RUH engaged with fundraising activity to ensure collaboration, co-ordination and maximum effectiveness.
- Maximise income by sharing knowledge, specialist expertise and experience with colleagues to maximise opportunities and add value.
- Liaison with the Charity Impact Manager when matching Legacy income with specific charity projects.
- Providing appropriate acknowledgments of support and regular updates and reports to executors, donors and families who support RUHX, to meet our commitments and retain their support.
- Representing RUHX in a variety of different contexts and to a variety of audiences, including presentations to individuals, companies and the public at forums and events.
- Ensuring that, where appropriate, supporters receive effective regional PR support.
- Supporting colleagues, as required, with the organisation of Fundraising events and maximising their fundraising potential.
- Maintaining an ethical framework and operating within recognised Codes of Practice that are appropriate for fundraising relationships between an NHS hospital and individual members of the public donating at a high level.

#### **4. Governance & Administration**

The post holder will be responsible for leading, implementing and managing the delivery of:

- Optimising legacy income wherever possible, by being able to identify the opportunities relating to the sale of assets, mitigating tax, or identifying cost-saving opportunities.
- Identifying contentious or potentially contentious situations such as fraud, mental capacity claims, Inheritance Act 1975 claims and others in order to maximise the value of the Legacy.
- Correct and appropriate allocation of income within the year end accounts in line with SORP including controls are in place to ensure that probable pledges are recorded in the correct financial year.
- Ensuring that all RUHX fundraising in relation to Legacy (Gift in Wills) & Tribute Fund complies with charity legislation and Fundraising Regulators Code of Practice, and that RUHX keeps abreast of changes in legislation, plus trends, technologies and new strategies instigating where appropriate.
- Maintain and support close communications with donors, executors and their legal representatives on the creation and management of financial support to RUHX through legacy bequests and other donations, including the administration of all aspects of the legal processes involved in RUHX receiving such support,
- Maintain full records of existing and prospective supporters including any agreed benefits. Ensure that all such support is properly contracted or confirmed in writing and that progress against income targets is monitored with other fundraising and finance staff.

- Monthly management reporting to the Associate Director RUHX and Head of Development re activity, outputs and strategy - for review together with actual income performance.
- Creating PC spreadsheets, project budgets, correspondence, media releases, publications and other documents for the post, together with reports required for internal fundraising committees and external funding agencies.
- Undertake specific projects / events / activity designed to improve the effective operation of the Legacy (Gift in Wills) & Tribute Fund Programme or generate new income, as agreed with the Head / Deputy Head of Fundraising.

### **Other Responsibilities**

- The Associate Director RUHX and Head of Development and the Legacy, Tribute & Manager will agree a programme of strategic and operational objectives for set periods and assess progress against these objectives at regular intervals, identifying corrective action as appropriate.
- The post holder will be expected to undertake ongoing Personal and Professional Development commensurate with the duties of this post and changes within the charity.
- The post holder maybe required to support other fundraising programmes during periods of absence, and attend key charity events and support the team achieving fundraising targets.
- Any other duties as may be reasonably requested by the Associate Director RUHX/ Head of Development

### **WORKING RELATIONSHIPS**

The post holder will be required to work collaboratively and to communicate with and internally and externally:

- Head of Development; To report to and work with the Head of Development to deliver legacy and tribute programme
- Projects Officer; To directly line manage Project officer to support legacy and tribute programme and broader projects such as donor recognition schemes.
- RUHX Senior Leadership: To support the Associate Director RUHX and Head of Development, to support the delivery of the charities 5 year strategy and key charitable projects.
- RUHX staff to work collaboratively as part of the wider team to ensure that activities are on brand, integrated, donor centred, innovative, maximise supporter engagement and lifetime value.
- RUH Wards & Departments proactively build positive working relationships with key senior clinical staff, wards and departments.
- Head of Operations, and RUH Finance to ensure all legacy administration and processes are adhered to.

### **POLICIES AND EXPECTED STANDARDS**

The post holder is required to familiarise themselves with all Trust policies and procedures and to comply with these at all times. The Code of Expectations of Employees in particular

sets out what you as a post holder are required to follow at all times, and you should study this carefully. Failure to comply with any of the Trust's policies may result in disciplinary action up to and including dismissal.

All staff must have an understanding of their responsibilities in relation to being accountable for knowing who is in and has access to their area of work. Staff must recognise the need to challenge appropriately and understand their duty of care relevant to their position within the organisation. Staff must be familiar with and understand the correct reporting process where there has been a potential breach.

## **OUR VALUES & BEHAVIOURS**

All staff are required to adopt and follow the Trust values and behaviours at all times. Our values and behaviours are:



New staff will be presented with a leaflet outlining the values and behaviours expected of them at trust induction.

## **CONFIDENTIALITY & INFORMATION GOVERNANCE**

All post holders must comply with all relevant legislation & Trust Policy with regards to Confidentiality & Information Governance, including the Data Protection Act (2018) ensuring that no information obtained through work is communicated to any persons other than those requiring it to complete their duties.

## **SAFEGUARDING ADULTS & CHILDREN**

All Trust staff have a responsibility to safeguard adults & children which includes an understanding of the relevant Trust & Local Safeguarding Adults & Children's Board Policies.

## **HEALTH AND SAFETY**

Employees must act at all times in line with relevant Trust Policies & the Health and Safety at Work Act (1974) to ensure a safe environment for patients, visitors and staff.

## **HEALTHCARE ASSOCIATED INFECTIONS (HCAIs)**

All Employees are responsible for ensuring that:

- your practice so far as is reasonably practicable, protects patients, staff and other persons against risks of acquiring HCAIs;
- where patients present with an infection or acquire an infection during treatment, that they are identified promptly and managed according to good clinical practice to treat the infection and reduce the risk of transmission.
- you follow all Trust policies, procedures and processes to meet the duties set out in the NHS Hygiene Code and assist in their full compliance by all staff within your department.

## **HEALTH & WELLBEING**

The Royal United Hospital is committed to promoting the Health & Wellbeing of its staff. The Trust is a smoke free site; smoking is not permitted anywhere in the grounds. The Trust has a Stress Management Policy, which staff should familiarise themselves with to ensure that they have adequate support for the management of their own, and their colleagues stress. The Trust has an onsite Employee Assistance Programme (EAP) which is available to all staff, offering support to staff & their families.

## **EQUALITY & DIVERSITY**

The Trust values Diversity and actively works towards promoting Equality both in terms of its healthcare provision and within its current and potential workforce. It is the aim of the Trust to ensure that no job applicant or employee receives less favourable treatment because of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, or sexual orientation.

## **PATIENT AND CARER EXPERIENCE**

The Trust continuously aims to improve the experience of patients and carers using the RUH. All staff are expected to follow the guidance contained in the Patient Experience Strategy for the RUH;

The 3 main points to remember are:

- 1) Communicate clearly with people;
- 2) Involve patients and carers in their care and with the hospital;
- 3) Seek out and use patient and carer feedback in all services.

Also refer to the Carer Policy, Respect behaviours and references to improving experience contained in policy and guidance; all staff will be aware of Equality and Diversity and will assist with accommodating people with special needs. Your individual behaviour can make a significant difference to patient and carer experience.

## **FLEXIBILITY**

This job description is intended to provide a broad outline of the main responsibilities only. The post holder is required to be flexible in developing their role in agreement with their designated manager. In addition they may be required by their manager to carry out any other duty commensurate with their banding and expertise.

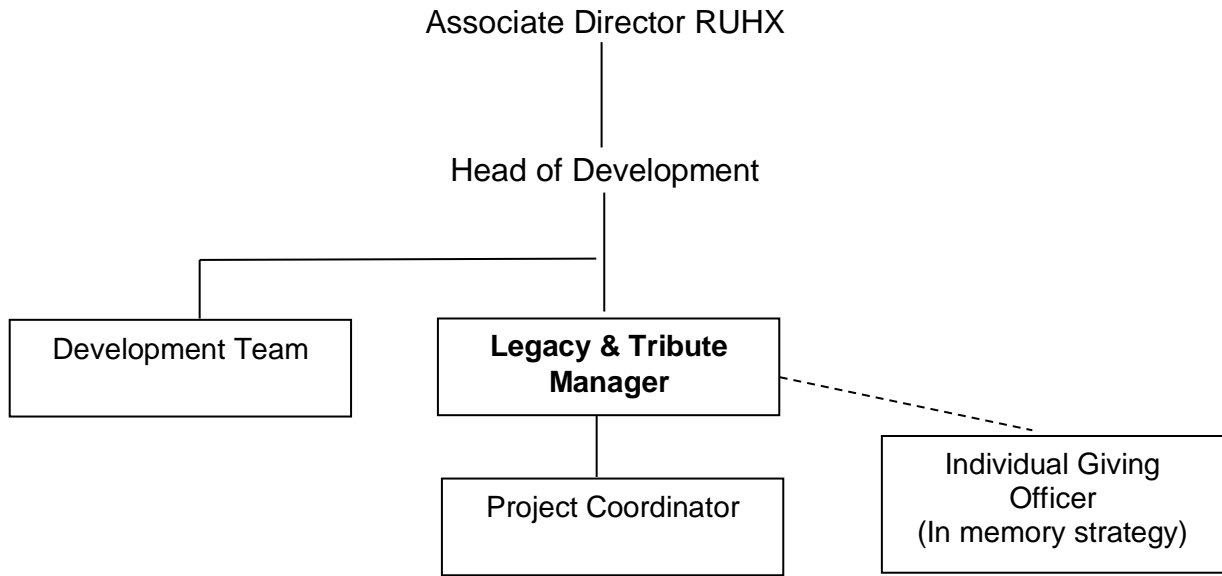
## **DIMENSIONS**

The role works closely with Head of Development and Individual Giving Officer, plus the Development team, to implement the Legacy & Tribute Fund fundraising strategy.

The Legacy, Tribute & In Memory Officer post has a fundraising target (c£1.2m) The post is supported by and line- manages a Project Co-ordinator.



## STRUCTURE CHART



### ANNUAL LEAVE ENTITLEMENTS:

Length of Service	Annual leave and public holidays
On appointment	202.5 hours plus 60 hours (27 days + 8 days) pro rata for part time staff
After five years' service	217.5 hours plus 60 hours (29 days + 8 days) pro rata for part time staff
After 10 years' service	247.5 hours plus 60 hours (33 days + 8 days) pro rata for part time staff

### NOTICE PERIODS:

Band	Notice Period
Band 1 – 3	4 weeks
Band 4	6 weeks
Band 5 – 6	8 weeks
Band 7 – 9	12 weeks

## **PERSON SPECIFICATION**

<b>CRITERIA REQUIRED</b>	<b>ESSENTIAL</b>	<b>DESIRABLE</b>
<b>Qualifications &amp; Training</b>	<ul style="list-style-type: none"> <li>• Educated to degree / diploma level or equivalent experience.</li> <li>• Excellent standard of English - written, spoken and grammar</li> <li>• Continued professional development</li> </ul>	<p>Business / charity marketing, or fundraising qualification</p> <p>Member of Institute of Fundraising or equivalent professional body.</p>
<b>Knowledge &amp; Experience</b>	<ul style="list-style-type: none"> <li>• Experience of generating income and meeting significant income targets.</li> <li>• Sound understanding of current UK laws, processes and procedures relating to Wills, Legacies and significant Major Gifts to charity etc.</li> <li>• Ability to interpret and implement with minimal guidance, legislation surrounding the making of Wills and Legacy Gifts, national standards and the Fundraising Regulators Code of Practice.</li> <li>• Significant experience in marketing and fundraising theory relating to Wills and Legacies, and strategies that have encompassed the use of prospect pools / research / gift tables / gift assessment / donor motivation / solicitation techniques / donor engagement events etc, designed to engage prospective higher level donors, and resulting in securing income targets.</li> <li>• Significant experience in an account / relationship management role providing high levels of customer care and dealing with complex, sensitive relationships aimed at securing engagement, agreement and income.</li> <li>• Significant experience in the use of media relations / marketing to promote the importance of the NHS cause (or similar) and Legacy support.</li> <li>• Significant experience of developing excellent working relationships with, and the engagement of, both a wide cross section of the public and senior level professionals in the legal and other sectors.</li> <li>• Significant experience of close Team working and co-operation to achieve best outcomes for an organisation's objectives.</li> </ul>	<p>Knowledge of, and empathy with, healthcare provision in the NHS and its current priorities.</p> <p>Knowledge of the local community including excellent networks</p> <p>Knowledge of RUHX &amp; its aims</p>

<b>Values</b>	<p>Values and respects others, treats everyone as an individual, is non-judgemental</p> <p>Motivated to be genuinely kind and caring</p> <p>Helps and co-operates with colleagues</p> <p>Pro-active and takes responsibility</p> <p>Willing to learn, open to change</p> <p>Motivated to make a difference in whatever way they can</p> <p>Takes pride in themselves, their appearance, their role and where they work.</p>	
<b>Specific Skills</b>	<ul style="list-style-type: none"> <li>• Ability to lead, monitor and evaluate the effectiveness of policies and strategies within areas of responsibility</li> <li>• Sound research / analysis / interpretation of Legator / Donor motivations &amp; requirements, and devising / amending appropriate strategies for each</li> <li>• Ability to develop comprehensive action and project plans for areas of responsibility</li> <li>• Ability to analyse a wide range of information and statistics relating to donors to: <ul style="list-style-type: none"> <li>➢ Support the Head of development in providing reports</li> <li>➢ Produce comprehensive and informative research on prospective funders</li> <li>➢ Provide presentations in a format that can be understood by a variety of audiences</li> </ul> </li> <li>• Excellent communication, presentation, negotiation and interpersonal skills at a senior level including: <ul style="list-style-type: none"> <li>➢ Speaking at formal events on behalf of the Appeal</li> <li>➢ Communicating with Legators, donors and other stakeholders at all levels</li> <li>➢ Leading on the writing and presentation of compelling reports / papers / proposals aimed at soliciting support</li> <li>➢ Leading on the design and production of high quality communication material, ensuring it meets the needs of the target audience.</li> </ul> </li> <li>• Ability to plan complex events, campaigns and media work, with an aptitude for organisational detail</li> <li>• Confident but sensitive telephone manner</li> <li>• Confidence to find &amp; articulate mutually beneficial opportunities for the charity &amp; prospective Legators / donors</li> <li>• Ability to create good press relations</li> <li>• Ability to use IT systems including Microsoft Office software, plus knowledge of RaisersEdge relationship management database to produce reports, publications &amp; proposals</li> <li>• Ability to budget and control the use of financial and other resources</li> <li>• Ability / confidence to work under own initiative / motivation and able to time-manage and prioritise workloads in busy and demanding circumstances with tight timescales;</li> <li>• Team working / Excellent team player</li> </ul>	

<p><b>Physical Skills &amp; Effort</b> <b>Emotional Effort</b></p>	<ul style="list-style-type: none"> <li>• Enthusiasm for meeting new people &amp; developing strong working relationships</li> <li>• Ability to act as the sole representative of the Appeal &amp; RUH in a range of fundraising settings, utilising impact, passion and integrity</li> <li>• Ability to demonstrate commitment and enthusiasm for fundraising work and the Appeal – being proactive, making improvements and bringing new ideas and developments to the table</li> <li>• Ability to maintain communication, empathy and confidentiality with patients / families / supporters in what can frequently be distressing or emotional circumstances (eg cancer, bereavement, estate planning etc), using patience and diplomacy at all times</li> <li>• Ability, confidence and tenacity to direct discussions / approaches to the point at which a request for financial support can be made - 'the ask'</li> <li>• Stamina and resilience, plus capable of concentrated work under pressure despite frequent interruptions</li> <li>• Ability to perform manual handling duties, eg. setting up fundraising events and equipment as necessary</li> <li>• Ability to be responsible for handling cash income from events prior to it arriving at the Appeal office</li> </ul>
<p><b>Requirements due to Working Environment</b></p>	<ul style="list-style-type: none"> <li>• Daily, and more or less continuous, VDU working with advanced keyboard use</li> <li>• Ability to work out of hours on an occasional bases, with time off in lieu where appropriate</li> <li>• Ability to travel off-site around the RUH catchment, as and when required to attend meetings / events etc.</li> </ul>