



**RELATIONSHIP FUNDRAISING MANAGER**  
**Candidate Brief**

**June 2024**



Thank you for your interest in this position and in Oakleaf.

It's an exciting time to join us. Oakleaf has a proud history of helping people across Surrey who are suffering from mental ill health. The need for good mental health support is growing, as are our funding needs and ambitions. We provide a range of support including 1-to-1 counselling, a wide variety of wellbeing activities which increase confidence and reduce social isolation, as well as work-related training courses and employment guidance.

We're looking for an individual with a strong background and experience of both fundraising and relationship building, which can be utilised to maximise income from donors. Experience identifying and building new supporter relationships is of importance, and an understanding of the local community would be of value although not critical.

### **Context of the Role**

This is an exciting chance to play a crucial role in a supportive and collaborative fundraising team. The position is newly created as we look to develop major donor fundraising further, giving the post holder the opportunity to lead on shaping this income stream. The role will be responsible for overseeing all individual donor relationships, ranging from small donations to major gifts. This includes developing and implementing a major donor strategy, as well as assisting the Head of Fundraising with corporate fundraising. You will be encouraged to use your experience and skills to shape the role, making a difference to the lives of hundreds of people attending Oakleaf every month.

Oakleaf offers a generous holiday package, contributory pension scheme and private health care. I look forward to meeting you soon.

Yours sincerely,

Clive Stone  
Chief Executive





# Job Description

## Relationship Fundraising Manager

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### Head office Accountability & Line Mgmt.

Head of Fundraising and Engagement

### Job purpose

The primary aim of the post is to manage relationships with individual supporters, generating income from donors (focusing on major donors) to aid Oakleaf's mission and strategy.

### Fundraising

#### Main duties & responsibilities

1. Manage recruitment, stewardship & retention of individuals supporters with a goal of long-term financial support.
2. Develop & implement a major donor strategy, including building relationships with key donors.
3. Undertake tours of Oakleaf at our HQ or outreach venues to individual donors to show impact of giving.
4. Maximise opportunities for individual supporters to attend Oakleaf events.
5. Research, formulate introductions & approach new prospects.
6. Instigate a legacy fundraising initiative.
7. Manage a communications plan for donors.
8. Account for all donations attracting Gift Aid and report accordingly.
9. Ensure all individual donations are adequately thanked.
10. Achieve agreed fundraising targets.
11. Assist with corporate fundraising alongside the Head of Fundraising, including through attending networking events and supporting Oakleaf's Mental Health Leaders Network.

### Administration

1. Keep accurate records for all work.
2. Ensure that the fundraising database is maintained effectively & accurately.
3. Ensure that expenses incurred are kept to a minimum.
4. Prepare accurate fundraising reports for the Trustee Board.

### General

1. Attend fundraising & charity events as required.
2. Ensure the organisations confidentiality procedures are adhered to.
3. Ensure maintenance of a safe & efficient working environment in accordance with current Health & Safety legislation including the Health & Safety at Work Act 1974, COSHH Regulations, Environmental Health & other Directives.
4. Perform any other reasonable duties as may be requested by the CEO.

*This job description is an indicator of general areas of responsibility & will be amended in accordance with the changing needs of the organisation & in consultation with the post holder.*

### Terms & Conditions

**Salary:** £32,000 – £34,000 (36 hours)

**Hours:** 28-36 hours per week (dependent upon applicant); flexible working offered

**Annual leave:** Pro rata to full time: 32 days including public/statutory holidays

**Probationary Period:** 3-month probationary period, satisfactory references

**Notice:** As per contract





# Person Specification

## Relationship Fundraising Manager

Method of Assessment (M.O.A.)  
 A=Application; I=Interview; T=Test; P=Presentation

Qualifications	Essential	Desirable	M.O.A.
Educated to Degree level		X	A/I
Professional or postgraduate qualification in fundraising		X	A/I

Skills and Abilities	Essential	Desirable	M.O.A.
At least three years' experience in a charity/third sector fundraising position or similar	X		A
Proven track record in developing strong relationships with major donors and personally securing gifts		X	A/I
Strong interpersonal and networking abilities; adept at building rapport quickly with people from a wide range of backgrounds	X		A/I
Experience of building and managing a portfolio of both ongoing and new relationships	X		A/I
Excellent written and verbal communication skills	X		A/I
Experience of budgeting, forecasting and working towards financial targets	X		A/I
High standard of computer literacy (Excel, Word, Power Point, Outlook & internet research)	X		A/I
Experience of CRM Act or similar relationship database	X		A/I
Excellent time management, project planning skills & ability to work independently	X		I
Willingness to work occasional early mornings, evenings and weekends as required	X		I
Ability to confidently undertake public speaking		X	I
Knowledge and understanding of the local Surrey community		X	I
An understanding of and empathy with the aims of Oakleaf & needs of its client group	X		A/I