

## JOB DESCRIPTION

<b>Post</b>	Legacy Manager
<b>Reporting to</b>	Fundraising Development Manager
<b>Accountable to</b>	Associate Director of Income Generation
<b>Contract type</b>	Permanent
<b>Location</b>	Whittington with some flexibility for remote working
<b>Hours</b>	Part time (22.5 hours per week) with flexibility to work evenings and weekends when required
<b>Annual salary</b>	E1 £39,224.42 to E3 £46,068.16 - Pro rata for part time hours.

<b>Job purpose</b>
<p>Reporting to the Fundraising Development Manager, the Legacy Manager is responsible for leading and delivering the long term growth strategy for legacy income at St Giles Hospice.</p> <p>The post holder will develop and implement a sustainable and scalable legacy programme that increases the number of legacy pledgers, strengthens the future pipeline of legacy gifts and delivers consistent income growth aligned to organisational objectives.</p> <p>The role will own the legacy value proposition, marketing strategy and support journey from initial engagement through to pledge stewardship. The post holder will champion a culture of legacy giving across the organisation and position leaving a gift in a Will as a meaningful and natural way to support St Giles Hospice.</p> <p>In partnership with the Fundraising Administration team, the Legacy Manager will ensure legacy gifts are managed professionally and compliantly, with strong forecasting, reporting and internal oversight.</p>

<b>Key tasks and responsibilities</b>
<p>The role entails but is not limited to:</p> <ul style="list-style-type: none"> <li>• Strategically plan, review and deliver a three to five year legacy growth strategy aligned to agreed income targets.</li> <li>• Lead the development, profitability and implementation of the Legacy portfolio, focusing on sustainable voluntary income growth through relationship management and audience development.</li> <li>• Develop and manage a clear legacy pipeline strategy, tracking prospects, intenders and confirmed gifts to support long term income forecasting.</li> <li>• Own the legacy marketing strategy, working collaboratively with Marketing and Communications and Data colleagues to ensure communications are insight led, compliant and effective.</li> <li>• Develop compelling legacy case studies and messaging that clearly articulate the impact of legacy gifts.</li> <li>• Build and manage relationships with solicitors, will writers and financial advisers to strengthen professional referral pathways and increase awareness of St Giles Hospice as a legacy beneficiary.</li> <li>• Represent St Giles Hospice within relevant professional and community networks to grow legacy opportunities.</li> </ul>

- Develop and deliver tailored stewardship journeys for legacy pledgers and intenders, ensuring an excellent supporter experience and long term engagement.
- Lead internal awareness and engagement to ensure colleagues feel confident and informed about legacy giving, embedding appropriate legacy messaging across key supporter and patient touchpoints.
- Work in partnership with the Fundraising Administration team to ensure effective oversight of legacy administration processes, accurate recording of income and appropriate allocation of restricted and unrestricted gifts.
- Take ownership of Legacy income and expenditure lines. Support financial budgeting, planning and results analysis within the portfolio. Provide monthly and quarterly reporting with commentary on performance and variances against plan.
- Proactively explore and test new cost effective methods to maximise legacy giving potential, using sector insight, digital opportunities and data analysis.
- Ensure all fundraising activities are fully compliant with legal requirements and the Code of Fundraising Practice and data protection requirements.
- Provide support to other areas of fundraising with a willingness to work flexibly according to the needs of the department when required.

Key relationships:

- Fundraising Development Manager
- Fundraising Administration team
- Digital and Data team
- Marketing and Communications team
- Clinical teams
- External legal and professional partners

## MAIN CONDITIONS OF SERVICE

### Our vision and values

All staff must commit to our vision and values and exhibit behaviours in line with these. We have adopted five core values that have been developed through engagement with our volunteers, staff, patients and families. These are the values that characterise all that we do and our behaviours with our patients and families, and each other.

#### Our values:

- We care
- We are trustworthy
- We work together
- We are creative
- We take pride

These values underpin everything we do and we expect all staff at St Giles, in all capacities - employees, bank staff, contractors, agency staff, those who hold honorary contracts, students and volunteers - to share and uphold these values. Each value is supported by behavioural standards and employees will be expected to display these behaviours at all times.

We also expect that everyone who works here shall act in such a manner as to justify public trust and confidence and to uphold and enhance the good standing and reputation

of St Giles Hospice. Individuals must therefore always carry out their duties with due regard to the Hospice's Equality and Diversity Policy.

### **Research and Development**

At St Giles we are committed to continually improving the service that we offer through development and research. To achieve this, we expect all employees to:

- commit to engage in research, audit and service improvement
- approach practice with an evidence base
- maintain professional development and learning in relation to your role

### **Mandatory training**

All staff must complete ongoing mandatory and role-specific training pertinent to their post, and this should be confirmed with their line manager.

### **Health and safety**

Staff are required to observe local health and safety arrangements and take reasonable care of themselves and persons who may be affected by their work.

### **Equal opportunities**

Staff are required to comply with the St Giles Hospice approach to equal opportunities and treat everyone the same, regardless of their gender, race, disability, marital status, religion or belief, sexual orientation, gender reassignment, pregnancy and maternity or age.

### **Infection prevention and control**

Staff must adhere to current policies and procedures on infection prevention and control to ensure that they are aware of these provisions. It is not intended to be an exhaustive list of responsibilities, but more an outline framework against which staff and managers have flexibility to develop and define the detail of the work undertaken.

### **Information governance**

Staff are required to keep all patient and staff information confidential unless disclosure is expressly authorised by your employer. Misuse of or a failure to properly safeguard any data considered to be confidential may be regarded as misconduct/gross misconduct and a disciplinary offence.

### **Patient and family experience**

Staff should ensure that they help to create a positive patient and family experience at all stages of a patient's interaction with the hospice and help to improve the patient experience within the hospice or community environment.

### **Safeguarding children and vulnerable adults**

All employees have a responsibility for safeguarding children and vulnerable adults in the course of their daily duties and for ensuring that they are aware of the specific duties relating to their role.

### Person specification

The person specification sets out the essential qualifications, experience, skills, knowledge, personal attributes and other requirements, which the post holder requires to perform the job to a satisfactory level. Without these qualities, the applicant cannot be appointed to the post.

<p><b>Knowledge and experience</b></p>	<p>Essential</p> <ul style="list-style-type: none"> <li>• Experience of working within the third sector or a values led organisation</li> <li>• Demonstrable experience of legacy fundraising or transferable experience within a strategic income stream with clear growth accountability</li> <li>• Proven experience of delivering income growth against agreed targets and KPIs</li> <li>• Experience of developing and implementing strategic plans</li> <li>• Experience of managing budgets, financial planning and reporting with commentary on variances</li> <li>• Experience of working collaboratively with marketing and data teams to develop insight led campaigns</li> <li>• Track record of successfully managing and developing relationships with individual supporters, customers or professional partners</li> <li>• Experience of analysing and interpreting data to inform decision making and maximise return on investment</li> <li>• Knowledge of the regulatory environment for fundraising from individuals including data protection, Gift Aid and Fundraising Codes of Practice and regulation</li> <li>• Experience of project management including budget setting and performance monitoring</li> </ul> <p>Desirable</p> <ul style="list-style-type: none"> <li>• Specific experience in legacy fundraising within a charity setting</li> <li>• Experience of developing and delivering a legacy marketing strategy</li> <li>• Experience of working with professional advisers such as solicitors or will writers</li> <li>• Experience of contributing to senior leadership or board level reporting</li> <li>• Experience using Donorflex or a similar CRM database</li> </ul>
<p><b>Values</b></p>	<ul style="list-style-type: none"> <li>• Exhibits our hospice values and behaviours</li> </ul>
<p><b>Skills</b></p>	<ul style="list-style-type: none"> <li>• Ability to think strategically and translate long term vision into operational delivery</li> <li>• Strong analytical skills with the ability to interpret financial and performance data and forecast future income</li> <li>• Excellent written communication skills with the ability to create compelling and sensitive legacy messaging</li> <li>• Excellent interpersonal and influencing skills</li> <li>• Ability to build and maintain strong internal and external partnerships</li> <li>• Confident presenting to a range of audiences including</li> </ul>

	<ul style="list-style-type: none"> <li>professional partners and senior stakeholders</li> <li>• Ability to prioritise and manage competing deadlines</li> <li>• Strong organisational and diary management skills</li> <li>• Computer literate with experience of CRM systems</li> <li>• Ability to understand when issues need escalation</li> <li>• Ability to maintain confidentiality</li> <li>• Ability to work effectively as part of a team</li> <li>• Resilience when working towards ambitious targets</li> </ul>
<b>Personal Attributes</b>	<ul style="list-style-type: none"> <li>• Empathetic and emotionally intelligent</li> <li>• Proactive and growth focused</li> <li>• Commercially aware and results driven</li> <li>• Collaborative and supportive</li> <li>• Ambassador for St Giles Hospice</li> <li>• Able to work under pressure</li> </ul>
<b>Other requirements</b>	<ul style="list-style-type: none"> <li>• Valid driving licence</li> <li>• Eligibility to work in the UK</li> <li>• Please note that St Giles Hospice does not hold a sponsorship licence and is therefore unable to accept sponsorship requests</li> </ul>

<b>Benefits</b>	
<b>Pay and conditions</b>	
<ul style="list-style-type: none"> <li>- Up to 33 days holiday plus bank holidays (Pro-rata for part time employees)</li> <li>- Eligible clinical staff transferring from the NHS will have their continuous service and annual leave recognised for up to 10 years and can continue their NHS pension contributions</li> <li>- Group pension scheme, matching contributions of up to 8%</li> <li>- Life assurance scheme, up to the state pension age</li> <li>- Enhanced sick pay, rising with service</li> <li>- Car lease scheme</li> </ul>	
<b>Training and development</b>	
<ul style="list-style-type: none"> <li>- A dedicated on-site Education team offering training and development opportunities</li> </ul>	
<b>Health and wellbeing</b>	
<ul style="list-style-type: none"> <li>- The Hub Wellness Support</li> <li>- Eligibility for flu vaccine</li> <li>- Employee Assistance Programme</li> <li>- Access to Mental Health First Aiders</li> <li>- Cycle to work scheme</li> </ul>	
<b>Family friendly</b>	
<ul style="list-style-type: none"> <li>- Enhanced Maternity and Paternity benefits</li> <li>- Shared Parental Leave</li> <li>- Supportive Time off policy</li> </ul>	
<b>Other benefits</b>	
<ul style="list-style-type: none"> <li>- Access to blue light and charity worker discounts</li> <li>- Free on-site parking</li> </ul>	

### **Working Environment**

Predominately based at the Whittington office with the expectation to attend events and meetings offsite across the geographical area served when required.

**This job description is intended to describe the main features of the role. It is therefore not exhaustive and incumbents may be asked to perform additional duties outside of their job description in the interest of the Hospice.**

### **Data Privacy**

Please note that any personal data submitted to St Giles Hospice as part of the job application process will be processed in accordance with the GDPR and related UK data protection legislation, for more information regarding GDPR please see:

<https://www.gov.uk/government/publications/guide-to-the-general-data-protection-regulation>

### **Equality of opportunity**

Entry into employment with St Giles Hospice and progression within employment will be determined only by personal merit and the application of criteria which are related to the duties of each post and the relevant salary structure. In all cases, ability to perform the job will be the primary consideration. No applicant or member of staff shall be discriminated against because of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation.

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