

YOUR NEW ROLE AT THE TRUST

JOB TITLE:	Legacy Manager	PAY BAND:
FUNCTION:	Fundraising & Marketing	Support Delivering Specialist/Managerial Technical Lead/Function Head Senior Leadership Team
THE TEAM:	The Legacy Manager role sits within the Legacy and Individual Giving team. This is a small team which supports the acquisition and stewardship of individual donors, including legacy giving.	




WHERE YOU WILL FIT

Director of Fundraising & Marketing	Director of Brand & Marketing	Senior Head of Individual Supporters & Events	Head of Individual Giving and Legacies	Legacy Manager
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HOW DOES THIS ROLE IMPACT YOUNG PEOPLE?

This role is critical to ensure The King's Trust is able to help young people in the future. Legacy giving is relatively small at The Trust, but the potential is large. This role will be critical in helping to develop an optimised legacy giving programme. While the role sits in the Individual Giving and Legacy team, it will work across the organisation to maximise the potential for legacy giving.

WHAT WILL YOU DO?

-  Work with the Head of Individual Giving & Legacies to develop a plan to encourage legacy giving and to steward those who have already enquired about leaving a gift or pledged a gift in their Will.
-  Lead on legacy administration, working with our third-party Legacy Administration Consultant, with the support of our legal team.
-  Manage the legacy notification pipeline and provide accurate reporting to support budgeting and financial forecasting.
-  Project manage and implement marketing activities, including in-person events, postal and email campaigns to increase legacy enquiries and pledges.
-  Work with colleagues in other teams to ensure that appropriate legacy messaging and opportunities to promote legacy giving are included in materials and events across The Trust.
-  Develop and deliver training programme for King's Trust staff and volunteers so that they are confident in promoting legacy giving to supporters they work with.
-  Matrix-manage the Individual Giving and Legacies Executive
-  Responsible for actively contributing to an equitable, diverse and inclusive workplace

THE SKILLS YOU'LL BRING

All of the roles at The Trust are key to our success and there are certain skills we need to be successful. And while we will shortlist the most qualified people for the role, we ask everyone for a supporting statement. If you think you could do the role, but don't have all the desirable experience, we would still love to see an application from you.

WE REALLY NEED YOU TO HAVE THESE

Skills & Knowledge	Why do we need this?
Strong project management skills.	You will be required to deliver acquisition campaigns and supporter journeys and will need to be able to project manage them from start to finish.
Interpersonal, influencing and networking skills.	You will need to work across a large organisation to identify opportunities where legacies could be promoted, and support colleagues in promoting legacies.
Able to work independently and in a team.	You will need to be able to work in a small team and also be able to work on your own to push forward legacy giving.
Experience	Why do we need this?
An understanding of legacy administration, including the legal challenges associated with gifts in Wills.	While you will be working with our expert legacy administration agency and have access to our in-house Legal team, you will be the internal lead on legacy administration
Experience in supporter stewardship/customer experience and/or marketing.	You will lead on developing and implementing stewardship journeys and acquisition campaigns.
Empathetic and sensitive.	You may be in contact with people whose loved ones have passed away and will need to be sensitive and empathetic.
Supporter focused.	You will need to be able to understand why supporters might want to leave a legacy, and be able to deliver a first-rate supporter experience so that they do go on to leave a legacy






WE WOULD LOVE IT IF YOU COULD DO THIS

Experience	Why do we need this?
An eye for detail.	You will need to accurately record financial information on legacy cases.
Run training sessions.	You will be running training sessions to help The Trust staff and volunteers to talk about legacy giving.
Programme planning and development, including getting buy-in from stakeholders.	This role will need to help develop a plan on how to expand our legacy giving programme, which requires the support of multiple stakeholders.
Line management.	You will be matrix managing the Individual Giving and Legacy Executive.
Skills & Knowledge	Why do we need this?
Knowledge of legacy marketing best practice.	You will be responsible for the delivery of the legacy marketing programme, including supporter journeys and acquisition campaigns.
Events management.	You will be responsible for running our in-person acquisition and stewardship events.

WHAT DO WE EXPECT FROM YOU?

OUR VALUES

Our values are at the heart of everything we do – they articulate who we are and how we work together to achieve our aims to help young people.

 <p>Inspiring We lead by example</p>	 <p>Approachable We are open minded and value diversity</p>	 <p>Empowering We enable positive change</p>	 <p>Non-Judgemental We focus on the potential, not the past</p>	 <p>Passionate We are absolutely committed to supporting young people</p>
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Here at The King's Trust, we're committed to equality, diversity and inclusion. We want to be an organisation that's representative of the communities we serve, which is why we strive for diversity of age, gender identity, sexual orientation, physical or mental ability, ethnicity and perspective. Our goal is to create an environment where everyone, from any background, can be themselves and do the best work of their lives.

We're a Stonewall Diversity Champion and we are Disability Confident employer. Our staff, volunteers and young people are supported by KT CAN (our Cultural Awareness Network), KT GEN (Gender Equality Network), KT DAWN (Disability & Wellbeing Network) and Pulse (LGBTQIA+ Network). For more information, [click here](#).

OUR BEHAVIOURS

We expect certain behaviours from you about how you interact with colleagues, our partners, young people & the public. As someone who works at a specialist/managerial level, we would expect that you live these behaviours.

Leading by Example	Continuous Improvement	Effective Communication	One Team	Delivering Results
<p>You inspire others through a passion for what we do You keep young people and our end goal in mind You build trust in others through reliability and holding self-accountable for success Resilient in the face of challenges, not taking constructive criticism personally You're authentic and bring unique talents to work, encouraging others to do the same You role model integrity and act according to our Values</p>	<p>You champion change initiatives and help others see the benefits and opportunities You take an entrepreneurial approach to improving how we do things You seek opportunities to enhance your own development and build expertise You role model a positive and constructive approach to giving & receiving feedback You support others in adapting to change</p>	<p>You're approachable, clear and assertive You cascade important and relevant information to others clearly and swiftly You treat people as individuals, tailoring communication and influencing style accordingly You communicate difficult messages and challenge others' thinking effectively You listen to and empathise with others to understand the root of situations before responding</p>	<p>You role model effective and mutually supportive teamwork with colleagues You manage the expectations of others, gaining buy-in where required You share knowledge and information You build and invest in relationships across The Trust You use awareness of how your own team fits within the wider organisation to find solutions</p>	<p>You translate The Trust's long-term vision and strategy into actionable plans & targets You take responsibility for making and implementing logical, data-based decisions You're flexible and responsive as priorities and requirements change You seek solutions and solve problems, empowering others to do the same</p>

THE WELFARE OF OUR YOUNG PEOPLE

The King's Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. As part of this commitment, we undertake basic disclosure checks per the Codes of Practice for all roles within The Trust, and for our roles working directly with young people, at an enhanced level. Having a criminal record will not automatically exclude applicants.