



## Job description

**Post:** Legacy Officer

**Department:** Fundraising

**Reports to:** Head of Legacies

The post holder will support delivery of the hospice's overall legacy fundraising strategy - with the aim of generating leads; encouraging consideration; supporting conversion and stewardship of those who choose to leave a gift in their Will to the hospice to increase pipeline volume, value and visibility and drive long-term income from this area.

This will involve managing key products, and delivery of new on and offline initiatives. The role is responsible for supporting the development of bespoke marketing campaigns, collateral, and messaging for these important audiences.

**Signature:**

**Date:**

### Our values and behaviours

Our Values are summarised by the acronym **I CARE**. They support our vision, mission and culture, reflecting who we are together and as individuals.

#### I CARE

<b>Integrity</b>	<ul style="list-style-type: none"> <li>• We are honest and open</li> <li>• We are trustworthy and authentic in our dealings with others</li> <li>• We always try to do the right thing</li> </ul>
<b>Compassion</b>	<ul style="list-style-type: none"> <li>• We are kind, supportive and caring</li> <li>• We have empathy and listen to those around us</li> <li>• We are warm and positive in our interactions</li> </ul>
<b>Accountability</b>	<ul style="list-style-type: none"> <li>• We work together to make the Hospice's vision a reality</li> <li>• We take responsibility for our work, performance and behavior</li> <li>• We acknowledge and learn from our mistakes</li> </ul>
<b>Respect</b>	<ul style="list-style-type: none"> <li>• We are inclusive, we value difference and work together effectively</li> <li>• We are sensitive to the thoughts, feelings and opinions of others</li> <li>• We treat everybody with dignity</li> </ul>
<b>Excellence</b>	<ul style="list-style-type: none"> <li>• We aim to be our best</li> <li>• We are forward-thinking and open to change</li> <li>• We share our skills, expertise and learning, striving for excellence together</li> </ul>

## Key responsibilities

- 1.1. Support the Head Legacies and Legacy Lead with the development and implementation of the legacy strategy to maximise future income from gifts in Wills.
- 1.2. Support Legacy Lead with operational delivery of legacy marketing and promotional activities across the legacy supporter journey e.g. acquisition; conversion; stewardship and in relation to estate administration.
- 1.3. Assist with the roll out of cross-organisational awareness plan and tailored training to support development of a legacy confident organisation.
- 1.4. Proactively engage cross-organisationally to identify and action opportunities for collaboration (Clinical; Wellbeing; Communities; Volunteering; Retail; other Income Generation teams etc.) in support of a more holistic (needs based and value adding) approach to the promotion of legacy giving.
- 1.5. Respond to legacy enquiries in a timely manner - build relationships and secure pledges ensuring high and consistent customer experience.
- 1.6. Stewardship of prospects (enquirers and considerers) towards gift and ongoing engagement / maintenance of legacy pledgers. Delivery of legacy related Hospice tours; events and other face to face engagement opportunities.
- 1.7. Assist in the monitoring and evaluation of legacy campaigns.
- 1.8. Undertake research as requested relating to legacy strategy and operational activities.
- 1.9. Build and maintain strong relationships with Solicitors and other potential Will writing partners – local and national.
- 1.10. Proactively seek relevant stories and case studies to help inspire more support.
- 1.11. Build and maintain knowledge of legacy fundraising and the legacy marketplace – through networking and event attendance - to ensure we continue to offer exceptional supporter care and communications.
- 1.12. Ensure systems (e.g. Donorflex) are managed, and supporter information processed in accordance with the requirements of the Data Protection Act. Maximise opportunities to gain and maintain communication consent in accordance with GDPR whilst identifying efficiencies as the strategy evolves.
- 1.13. Ensure that you and others live up to the Hospice brand and adhere to brand guidelines.
- 1.14. To undertake any other such duties or general tasks and hours of work as may reasonably be required and to work in other locations within the Hospice organisation.

A job description is not a rigid or inflexible document but acts to provide guidelines to the duties expected while in post.

This job description will be reviewed and amended in the light of changing professional demands.

## Personal specification

**Post:** Legacy Officer

**Department:** Fundraising

### Qualifications and Training

- Educated to A-Level standard or equivalent in relevant areas
- Proficient in Microsoft Word, Excel, PowerPoint and CRM databases

### Work background and experience

- Experience of charity fundraising in a voluntary or paid capacity and/or experience in direct marketing
- Experience of delivering supporter stewardship journeys and/or proven experience of delivering outstanding customer service
- Experience of working as part of a team who directly service and engages with members of the public, supporters or customers across a range of channels including: mail, email, telephone and social media
- Experience in successfully delivering projects to agreed time frames and budgets
- Proven experience of effectively using databases
- Current knowledge of legal aspects related to direct marketing – Fundraising Regulator requirements, data protection, gift aid
- Experience in organising, delivering and evaluating activities
- Experience in working with agencies and/or suppliers
- Knowledge of the latest trends and techniques in direct marketing and legacy fundraising with proven experience in applying these successfully
- Experience in applying the principles of donor stewardship, particularly with legacy supporters

### Particular skills and aptitudes

- Understanding of legacy fundraising environment and potential challenges and opportunities within this key income stream
- Excellent relationship management skills, with the ability to relate to individuals at all levels and show empathy and tact
- Strong written and verbal communication skills, including excellent interpersonal and telephone skills

- Excellent planning, organisational and project management skills
- High level of attention to detail with a methodical approach to tasks
- Engaging personality with the ability to build and maintain relationships considering the potentially sensitive nature of legacy and in memory fundraising
- Excellent prioritising skills – working to tight deadlines
- Adaptable to change with a solution focused approach to problem solving
- Ability to use databases
- Experience in organising events

### **Personal qualities and other requirements**

- Tact, diplomacy and ability to maintain confidentiality
- Demonstrable ability to multi-task
- Ability to work with people of different backgrounds and volunteers
- Outgoing, people oriented
- Professional approach to represent Princess Alice Hospice to supporters
- Able to inspire others to improve the way things are done; show a proactive commitment to self-development through continuous improvement
- Proactive and target driven approach to programme/project delivery
- Driving licence
- Awareness of, and commitment to the Mission, Vision and Values of the Hospice