



## Job description

<b>Post:</b>	Legacy Officer		
<b>Department:</b>	Fundraising		
<b>Reports to:</b>	Legacy Lead		
<p>The post holder will support delivery of the Hospice's overall legacy strategy. They will help build internal awareness around the importance of gifts in Wills and collaboration across teams to support increased engagement amongst key audiences to drive more active consideration and action. Key areas of focus will include lead generation; conversion (to Will writing and legacy giving) and stewardship of those generous supporters who have already decided to support the Hospice with a gift in their Will. Ensuring all legacy gifts left to the Hospice are managed in a sensitive; timely and professional way.</p>			
<b>Signature:</b>		<b>Date:</b>	

### 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>	<p>We work together to make the Hospice's vision a reality</p> <ul style="list-style-type: none"> <li>We take responsibility for our work, performance and behaviour</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

- Support the Head Legacies and Legacy Lead with the development and implementation of the legacy strategy to maximise future income from gifts in Wills.
- 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.
- Support the Legacy Administration Lead in the timely, sensitive and professional effective administration and case management of gifts in Wills.
- Assist with the roll out of internal awareness activity and tailored training – as appropriate - to support development of a legacy confident organisation.
- Proactively engage cross-organisationally to identify opportunities for collaboration (Clinical; Wellbeing; Communities; Volunteering; Retail; other Income Generation teams etc.) in support of a more holistic to the promotion of legacy giving.
- Respond to legacy enquiries in a timely manner - build relationships and secure pledges ensuring high and consistent customer experience.
- Stewardship of Prospects towards gift and ongoing engagement / maintenance of legacy Pledgers. Delivery of legacy related Hospice tours; events and other face to face engagement opportunities.
- Maintain Donorflex database in relation to legacy activities and donor communications.
- Assist in the monitoring and evaluation of legacy campaigns.
- Undertake research as requested relating to legacy strategy and operational plan.
- Build and maintain strong working relationships with local Solicitors and other Will writing partners.
- Proactively seek relevant stories and case studies to help inspire more support.
- Build and maintain knowledge of legacy fundraising and the legacy marketplace – through networking; event attendance and training - to ensure we continue to offer exceptional supporter care and communications.
- Ensure systems are managed, and supporter information processed in accordance with the requirements of the Data Protection Act.
- Ensure that you and others live up to the Hospice brand and adhere to brand guidelines.
- 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 or marketing in a voluntary or paid capacity
- Experienced across a range of promotional channels including mail, email, telephone, social and internal
- Proven experience of delivering outstanding customer service or of delivering supporter stewardship
- Experience in organising, delivering and evaluating activities
- Experience in working with agencies and/or suppliers
- Experience in organising events
- Proven experience of effectively using databases

### Particular skills and aptitudes

- Strong written and verbal communication skills
- Excellent planning, organisational and project management skills
- Excellent relationship management skills, with the ability to relate to individuals at all levels
- Adaptable to change with a solution focused approach to problem solving
- Understanding of legacy fundraising environment
- Current knowledge of legal aspects related to marketing – Fundraising Regulator requirements, data protection, Gift Aid etc.

### Personal qualities and other requirements

- Confident, people oriented
- Able to show empathy and demonstrate empathy and tact
- Ability to multi-task
- High level of attention to detail with a methodical approach to tasks
- Professional approach to represent Princess Alice Hospice to supporters
- Able to inspire others
- A proactive commitment to self-development
- Driving licence
- Awareness of, and commitment to the Mission, Vision and Values of the Hospice