



**LOVE WITHOUT LIMITS**



**Edinburgh**

**Dog  
&  
Cat**

**Home**

**Legacy Officer  
Application Pack**





## **WHO WE ARE**

**Here at Edinburgh Dog and Cat Home, we strive to make sure that every pet has the loving home it deserves, and we get our claws into our cause.**

## **OUR MISSION**

**Sometimes caring for dogs and cats in the unconditional way they love us means taking them in, but sometimes, dog and cat rescue means keeping them exactly where they are. If a pet already has a loving home, we want to keep them there whenever possible.**

**This sometimes means helping out owners whose circumstances have changed through our Pet Foodbanks or by raising awareness of pet poverty to support lasting change. So rather than take them in and help them find a new home, we want to keep them where they're already loved.**

**We're a small but dedicated team united by our unconditional love of animals and our dedication towards their care, whatever it takes.**



## **PURPOSE OF ROLE**

**The Legacy Officer is a new role which will play a pivotal part in growing this important source of income which comprises both legacy administration and legacy marketing.**

**Legacies play a vital role at the Home, funding on average 1/3 of our annual income. As legacy officer you will support the implementation of a legacy strategy, aimed at growing income.**

# KEY RESPONSIBILITIES

## Strategy

- **Work with the Legacy and Individual Giving Manager and Head of Fundraising to develop the legacy programme, develop the strategy and grow income, regularly reporting against your KPIs.**

## Legacy Administration

- **Manage the day-to-day administration of legacy caseload (currently approx. 40 per annum), handle complex and contentious legacy gifts, relationships and resolve any issues.**
- **Ensure that the receipt of legacy income is optimised, and the funds received are correctly administered whilst also ensuring all gifts are correctly used in accordance with the wishes of the donor.**
- **Ensure compliance with all legal and regulatory requirements and maintain up to date knowledge of laws relating to this area of fundraising.**
- **Review processes and best practice for administration of legacies.**

# **KEY RESPONSIBILITIES**

## **Legacy Administration (continued)**

- **Work in collaboration with the Fundraising Administrator and Supporter Engagement Officer to ensure an excellent supporter relationship for key prospects and all legacy enquirers and pledgers.**
- **Work in collaboration with Database and Insights Officer to ensure all legacy related details, income and communications are correctly recorded and accessible on our CRM, utilise CRM to generate reports and analysis of KPI's**
- **Work in collaboration with Finance department to produce calculations for annual budgets, forecast and accruals.**

## **Marketing and Engagement**

- **Support and collaborate with wider fundraising and communication colleagues to develop understanding of legacies and ensure a drip feed approach to marketing**
- **Manage a pipeline of supporters with opportunities to grow number of pledgers, increase supporter loyalty and increase engagement**

# **KEY RESPONSIBILITIES**

## **Marketing and Engagement (continued)**

- **Work across all teams in the Home to identify and target legacy prospects**
- **Build strong relationships with all key stakeholders from supporters to solicitors to develop understanding and value of legacy giving**
- **Develop and organise cultivation events**
- **Be adaptable and flexible to the changing needs of our legacy work**

## **Additional**

- **It is the responsibility of each individual member of staff to ensure that they are aware of and up to date on all company policy and procedures.**
- **Adapt to new ways of working and supporting new services.**
- **Any other ad hoc duties required of the role, as directed by the Individual Giving and Legacy Manager**

# PERSON SPECIFICATION

	<b>Essential</b>	<b>Desired</b>
<b>Education &amp; Training</b>	<ul style="list-style-type: none"><li>• IT literate in all Microsoft packages</li></ul>	<ul style="list-style-type: none"><li>• Relevant professional qualification such as Certificate in Charity Legacy Administration (CICLA)</li></ul>
<b>Experience</b>	<ul style="list-style-type: none"><li>• Proven experience in legacy or estate administration with strong understanding of probate, property and tax law</li><li>• Experience of developing strong relationships with key stakeholders</li><li>• Experience of working with a CRM database</li><li>• Experience of legacy marketing</li><li>• Experience of delivering high quality supporter communications and care</li><li>• Monitoring, evaluating and reporting on the success of legacy activities</li></ul>	<ul style="list-style-type: none"><li>• Experience of organising donor cultivation events</li><li>• Experience of copy writing</li><li>• Experience of using digital design tools (e.g. Canva)</li><li>• Experience working with external agencies</li></ul>



# PERSON SPECIFICATION

## Skills & Knowledge

### Essential

- Excellent communication - ability to challenge and influence stakeholders where appropriate to ensure maximum income is received from legacies
- Good research skills to identify prospective support
- Proficient numeracy skills
- Excellent IT skills with knowledge of how to use and maximise a CRM system effectively
- Strong relationship management skills
- An analytical thinker with strong attention to detail
- Working knowledge of fundraising compliance and data protection regulations

### Desired

- Knowledge of (or willingness to develop) animal welfare and the challenges related to fundraising for this type of organisation
- Knowledge of different marketing channels and how to utilise them effectively

## **Personality**

### **Essential**

- Positive professional attitude
- Diplomatic and empathetic - able to develop and sustain long-term working relationships with people at all levels (internal and external stakeholders)
- Hands on and target driven
- Adaptable to changing demands and priorities

### **Desired**

- Persuasive advocate for animal welfare
- Have a creative and constructive approach to challenges and opportunities

## **Additional Information**

Full-time role, 35 hours per week

Salary £25,000 - £27,000 - DoE

We offer hybrid working with the option to discuss flexible and compressed hours. You would be expected to work on site at the Home for at least one day per week, with the option of remote work for the rest of the week.

The Legacy Officer will report to the Individual Giving & Legacy Manager

## **Staff Benefits:**

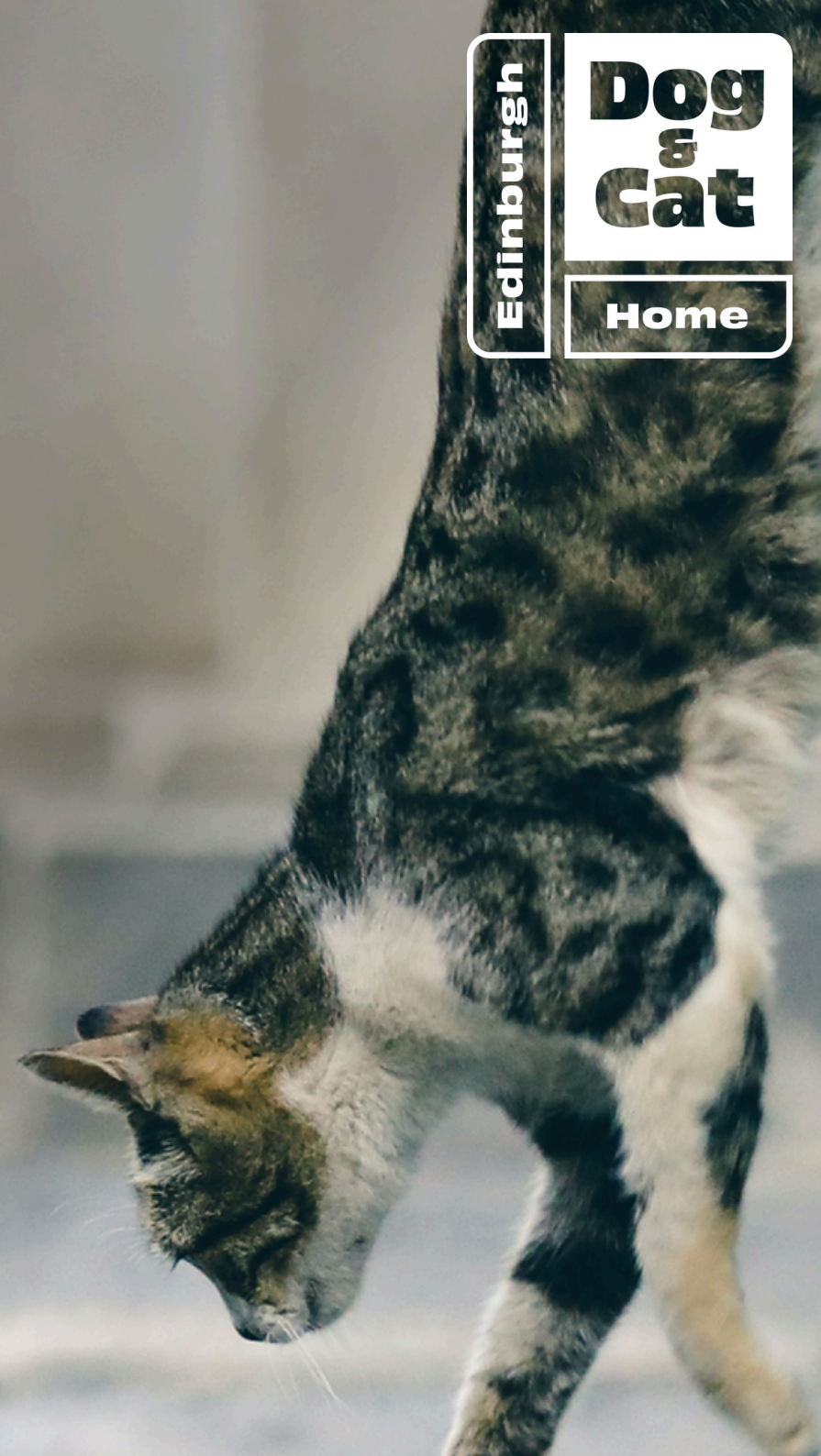
- **Enhanced holiday + bank holidays, increasing with length of service**
- **Life Insurance**
- **Enhanced maternity**
- **Generous pension scheme**
- **Employee Assistant Programme**
- **Staff wellbeing program**
- **Winter flu vaccinations**
- **Social team events**
- **Discounted pet insurance**
- **Charity worker discounts**

**+Many more**

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## **HOW TO APPLY**

**Submit your CV and a covering letter to [recruitment@edch.org.uk](mailto:recruitment@edch.org.uk) by midnight on Tuesday 14th May 2024.**