

Job Description and Person Specification

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| Job Title: | Legacy and In Memory Fundraiser |
| Line Manager: | Head of Fundraising |
| Professionally Accountable to: | Head of Fundraising |
| Hours of Work: | 37.5 hours per week (30 hours per week for the right candidate). Flexible working hours, which will include some working at weekends and evenings. Home working will not exceed 1 day p/w. |

JOB PURPOSE

Playing a key role in the fundraising team, you will lead on Legacy and In Memory fundraising for the Hospice, inspiring donors to leave a lasting gift and secure our future. This varied and interesting role will see you drive Legacy and In Memory activity for Weston Hospicecare and will include the development of a Gifts in Wills strategy to maximise income from this important area. You will develop year-round activity including running and expanding our annual 'Make a Will Week', developing our legacy proposition and marketing plans, organising inspiring year-round stewardship activity and events and developing promotional activities, such as Direct Mail, as well as promoting activity internally and training colleagues from across the organisation.

Alongside, you will utilise your superb organisational skills to develop robust processes for tracking and reporting on progress through the Gift in Wills pipeline, pledger recruitment, administration of estates and stewardship of In Memory donors and Gifts in Wills pledgers.

RESPONSIBILITIES

- Lead on the development of a three-year GiW strategy and operational plan in consultation with the Head of Fundraising.
- Inspire support through GiW by developing a clear and compelling GiW, fundraising proposition and ensuring consistent and compelling messaging across all channels.
- Drive activity by working with the Fundraising & Communications team, clinical staff and other internal stakeholders to raise awareness of the importance of GiWs and to train them to promote this type of giving.
- Lead on the marketing of GiWs to all hospice supporters, analysing previous activity and developing marketing through techniques such as face to face and Direct Mail.
- Build relationships with local firms of solicitors and develop and run our annual 'Make a Will Week', (MAWW), fully integrating this activity with GiW marketing overall.
- Develop compelling and relevant marketing materials in conjunction with the Communications team, as required.
- Work with the Finance team to monitor progress, through the GiW Pipeline, tracking pledger recruitment, and KPIs and report to the Head of Fundraising.
- Monitor and administer existing estates, working with solicitors and executors to expedite settlement and alert the Head of Fundraising, if legal complexities are anticipated.
- Organise and run inspiring stewardship events at the hospice or other venues, with colleagues in the Fundraising team.
- Provide excellent stewardship to all supporters who engage with legacy giving, and seek to develop, sustain and nurture those relationships.

- Identify and realise opportunities to promote GiW within cross organisational projects, such as Light up a Life.

In Memory

- Establish workflows that channel In Memory donors appropriately.
- Devise an In Memory strategy with the Head of Fundraising, that focuses on identification, stewardship and relationship building to establish continuity of support.
- Research and introduce relevant fundraising products, such as Tribute site.
- Monitor, analyse and report to Head of Fundraising, income levels across activities and recommendations for developing activity.
- Work closely with colleagues in Community and Events to coordinate necessary support for in Memory donors activities.
- Where appropriate and working with the Communications team seek to gain consent to use personal stories, images and testimonials.
- To introduce other opportunities to In Memory donors such as Memory Tree and GiW.

Professional Responsibilities

- To maintain confidentiality.
- To work within the policies, procedures and guidelines of Weston Hospicecare, in accordance with statutory requirements, and to best charity fundraising and communications practices.
- To be familiar with fire, emergency and safety regulations, ensuring compliance across all fundraising and sites/events.
- To maintain good working relationships with other members of the hospice staff and volunteers.
- Undertake any in-service training in line with Weston Hospicecare's policies.

Educational Responsibilities

- To participate in the orientation and development of new staff members and volunteers.
- To keep up to date with sector best practices and legislation.
- To maintain and extend personal knowledge and expertise in all aspects of the role and to share information openly.
- To attend all statutory and mandatory training as required.

Health and Safety

Under the provision of the Health and Safety at Work Act 1974, it is the duty of every employee:

- To take reasonable care of themselves and others at work.
- To co-operate with the Hospice as far as is necessary to enable them to carry out their legal duty.
- Not to intentionally or recklessly interfere with anything provided, including personal, protective equipment for health and safety or welfare at work.

Data Protection

You are required to control and process data held on computer. This must be undertaken lawfully in compliance with the UK's GDPR and Data Protection Act. Breaches of confidentiality in relation to confidential, personal or sensitive data will result in disciplinary action, which may include dismissal.

Additional Job Facts

- Maintain a smart, professional appearance at all times in line with Hospice policy.
- Conduct yourself in accordance with the Hospice values, and to be a good ambassador for the Hospice.
- Demonstrate a responsible attitude towards economy and care of equipment and other resources.

- There will be times when you will be required to work at weekends and in the evenings. This is recorded and redeemable as Time in Lieu.

Scope of Job Description

This job description reflects the immediate requirements and objectives of this post. It is not an exhaustive list of the duties, but gives a general indication of work undertaken which may vary in detail in the light of changing demands and priorities. Substantive changes will be carried out in consultation with the post holder.

This job description is subject to periodic review and amendment.

PERSON SPECIFICATION – LEGACY & IN MEMORY FUNDRAISER

| Criteria | Essential/ Desirable | How Evidenced & Assessed |
|---|---------------------------------|---|
| Qualifications and Training | | |
| <ul style="list-style-type: none"> ▪ Undertaken Legacy fundraising training with a demonstrable commitment to CPD ▪ Hold a professional charity related qualification ▪ Member of the Institute of Fundraising | D D D | A/C A/C A/C |
| Knowledge and Experience | | |
| <ul style="list-style-type: none"> ▪ Experience of working within a fundraising team ▪ Experience of supporter development and relationship management ▪ Experience of income and expenditure budget management ▪ Experience of meeting financial targets ▪ Able to ensure that the Hospice's In Memory and Legacy fundraising programmes reflects best practice, as set out by the Institute of Fundraising ▪ Experience of Legacy and/or In Memory fundraising ▪ Experience in legacy case work or probate, liaising with solicitors | E E E E E D D | A/I A/I A/I A/I A/I A/I A/I |
| Communication and people skills | | |
| <ul style="list-style-type: none"> ▪ Excellent communication skills, both verbally and in writing including the ability to demonstrate the value of leaving a gift in a will or a gift in-memoriam as well as writing and presenting strategy/project plans/reports ▪ Ability to communicate empathetically with patients and supporters around sensitive issues such as bereavement and gifts in wills | E E | I I |
| Organisational Skills | | |
| <ul style="list-style-type: none"> ▪ Proactive and highly organised ▪ Ability to manage a wide-ranging and fluctuating workload which encompasses complex logistical project management and other related tasks ▪ With the support of the Director of Fundraising and Communications, plan activities and manage own workload to ensure goals and targets are met ▪ Ability to monitor, analyse and segment data and contacts for fundraising purposes | E E E E | A/I A/I A/I A/I |

| Special Knowledge | | |
|--|---|-----|
| <ul style="list-style-type: none"> ▪ Knowledge and understanding of the Charities Act and laws which are relevant to fundraising practice | D | A/I |
| <ul style="list-style-type: none"> ▪ Keep up to date on current In Memory and Legacy fundraising techniques, supporter giving trends, data techniques, legal issues and methodologies used. | D | A/I |
| <ul style="list-style-type: none"> ▪ Knowledge of Institute of Fundraising Code of Practice | D | A/I |
| <ul style="list-style-type: none"> ▪ Knowledge and understanding of Inheritance Tax and other tax issues and how these apply to donors | D | A/I |
| Other Requirements | | |
| <ul style="list-style-type: none"> ▪ Responsible, hard-working and enthusiastic, self-motivated, highly personable, confident, flexible, organised, creative, sense of humour, honest | E | A/I |
| <ul style="list-style-type: none"> ▪ Commitment and passion for the hospice sector | E | A/I |
| <ul style="list-style-type: none"> ▪ Ability to work effectively under pressure | E | A/I |
| <ul style="list-style-type: none"> ▪ Able to work as part of a team | E | A.I |
| <ul style="list-style-type: none"> ▪ Able to transport yourself within our catchment area | E | A/I |

Key: E = Essential
A = Application

D = Desirable
I = Interview

C = Certificate

Don't meet every single requirement?

We are dedicated to building a diverse, inclusive and authentic workplace, so if you're excited about this role but your experience doesn't align perfectly with the job description or person specification, we encourage you to apply anyway. You may be just the right candidate for us.