

JOB DESCRIPTION

Job Title:	Legacy Officer
Directorate:	Fundraising/Communications
Location:	Agile working from Tower Hill, London and home working
Reporting to:	Legacy Manager (Public Engagement Team)
Responsible for:	N/A

PURPOSE OF THE JOB

To support and deliver the Legacy and In Memory fundraising programmes to meet income targets. This involves promoting legacy giving across the team, organisation, supporter bases and cold audiences to increase the level of current legacy supporters, recruit new supporters and pledged gifts; managing all legacy and in memory stewardship and income processes, assisting with marketing and advertising efforts; and supporting on legacy events.

KEY RESPONSIBILITIES

- Manage and review your own caseload of pecuniary and residuary estates on a regular basis, administering legacy gifts sensitively and correctly from beginning to end, including fully and accurately recording and updating the progression of cases on Raiser's Edge and in files, and sending appropriate and timely correspondence to lay executors, solicitors and other charity legacy departments.
- Add new legacy notifications onto Raiser's Edge, save documents to files and update existing cases, including in the Legacy Pipeline and Legacy Forecasting documents regularly and accurately.
- Support the Legacy Manager with the implementation of the Legacy acquisition activity, through direct marketing, social media and other marketing and advertising approaches.
- Assist in planning, delivering, monitoring and reporting on the annual Legacy Awareness campaigns.
- To deliver the ongoing online and offline marketing plan and supporter journeys.
- Support and deliver the current Legacy and In Memory strategy.
- Manage the online In Memory fundraising platforms, online and offline funeral collections and donations, as well as supporter requests.
- Work with others across Fundraising to deliver legacy events throughout the year.
- Complete efficient execution of In Memory gift administration, income and acknowledgements processes and stewardship activities.
- Develop relationships with In Memory and Legacy supporters; thanking them and responding to their enquiries appropriately and in a timely manner, and showing them other ways they can support St Mungo's and the impact of their support through various communications.
- Lead the Legacy and In Memory relationship with the Fundraising Operations team, regarding the supporter care aspect of maintaining donor relationships; including, providing clear written and face to face briefings on appeals, responses, coding and data capture; and recording required details.
- Contribute to the planning and activities carried out by the Public Engagement team and the

wider Fundraising and Communications teams.

Knowledge Development

- Develop and maintain a detailed knowledge of St Mungo's projects and services to produce appropriate and timely communications which reflect the funding needs of the organisation.
- Stay informed of developments in Legacy and In Memory giving (through online forums, training and networking, benchmarking, best practice).
- Provide support in testing new methods of promoting Legacy and In Memory giving.
- Champion the Legacy and In Memory programmes across Fundraising and the organisation.

Regulation

- Ensure work practices are in line with Fundraising Regulator, Fundraising Codes of Practice, Gift Aid Regulations, Data Protection Act and GDPR, as well as within St Mungo's Fundraising Performance Standards and Privacy Statement.
- Manage reputational issues and record positive and negative feedback systematically.
- Ensure donor communication preferences are accurately recorded, updated and adhered to.
- Identify and escalate risks and issues as appropriate, providing feedback to the line manager on progress and recommending alternative action where required.

GENERAL

- Adhere to St Mungo's Policies and Procedures at all times.
- Cover for other members of the team and division as necessary.
- Being proactive in reviewing and evaluating own performance and identifying and acting upon areas for improvement and development.
- Undertaking, as required, any other duties compatible with the level and nature of the post and/or reasonably required by more senior members of staff.
- Attend and participate in divisional and team meetings and other meetings as required.

This job description covers the current range of duties and will be reviewed from time to time. It is St Mungo's aim to reach agreement on changes, but if agreement is not possible, St Mungo's reserves the right to change this job description.

PERSON SPECIFICATION

Legacy Officer

Although we are keeping direct experience/knowledge requirements to a minimum, we do need you to use the application form or supporting statement to demonstrate your capabilities, in relation to the essential requirements in the person specification below. Where relevant use your answers to illustrate how your competences have helped you achieve positive results.

ESSENTIAL REQUIREMENTS

Experience, Skills, Knowledge and Abilities – required for application form:

1. Broad level of legacy administration (or legal or similar detailed administrative work) and legacy marketing (or similar charity, fundraising or other marketing) experience.
2. Confident in building relationships with individual donors, lay executors and solicitors, with sensitivity to those who are bereaved, and being a credible representative for the charity and the cause.
3. Adopts a creative and critical approach to work, with strong project management, copywriting, proofreading, and research skills and an excellent, dedicated attention to detail.
4. Confident, clear and thorough communicator who responds to enquiries in a timely manner – orally and in writing – with an ability to liaise, negotiate and influence other colleagues, donors and volunteers.
5. Capable user of IT including Word, Excel, PowerPoint and Raiser's Edge or other fundraising database and online platforms.

The following are required of all roles with St Mungo's. However, you do not need to address these in your application.

- Genuine interest in and commitment to St Mungo's work and client group.
- An understanding of and commitment to diversity & equality.
- For non-shift roles. Willingness and ability to work hours outside of normal office hours on occasion (time off in lieu will be granted).
- Willingness to work flexibly in response to changing organisational requirements.

In the selection testing/interview process, we will be assessing candidates against the following competencies:

COMPETENCY	PRIMARY INDICATORS
Improving and Innovating	<ul style="list-style-type: none"> • Is open to new ideas, improvement and change. • Handles situations and problems with innovation and creativity. • Shows commercial and financial awareness.
Interacting and Influencing	<ul style="list-style-type: none"> • Takes responsibility and demonstrates values-driven leadership. • Shows self-awareness. • Works well with other people. • Collaborates and networks effectively internally and externally. • Shows sound communication and influencing skills.
Understanding and Doing	<ul style="list-style-type: none"> • Able to find and analyse relevant written and numerical information and use it to make sound judgements. • Able to think strategically. • Demonstrates the necessary technical skills and aptitudes at the level that are required for the role. • Has good writing skills at the level required for the job. • Plans, organises and manages time well. • Demonstrates compliance and accountability.
Involving and Including	<ul style="list-style-type: none"> • Builds client/stakeholder involvement into all activities. • Is client and customer focused. • Aware of own level of cultural competence and proactively seeks to develop. • Actively promotes equality, diversity and inclusion among colleagues and clients.
Managing and Empowering (for managers only)	<ul style="list-style-type: none"> • Builds a high performing team. • Provides staff with clear direction and support. • Motivates, supports, enables and promotes the wellbeing of their team. • Manages the operational aspects of their function efficiently. • Implements plans, strategies and services effectively. • Actively contributes to service growth.