

**Job Description and Person Specification**

**Job Title:** Legacy and Philanthropy Executive

**Salary Range:**

**Grade:**

**Hours:** 22.5 hours per week

**Department:** Income Generation, Marketing and Communications

**Location:** St Michael’s Hospice, Bartestree

**Reports to:** Income Generation, Marketing and Communications Director

**Responsible for:**

No direct reports, potential for working with volunteers.

**Financial Responsibilities:**

To support the Income Generation Director with the legacy budget (circa £1.5m) and the growth of major donor fundraising for the hospice.

**Job Purpose:**

With support from the Director, deliver and evaluate legacy and major donor programmes, to support strategic aims to grow these income streams. To maximise supporter recruitment and development and ensure long-term growth for St Michael’s Hospice. To manage the stewardship of donors, delivering an excellent supporter experience and encourage St Michael’s Hospice as the charity of choice for gifts in Wills amongst the Herefordshire community.

**Responsibility Areas**

**Strategy**

* Work closely with the Income Generation, Marketing and Communications Director and Head of Community Fundraising to deliver the strategies and supporting operational plans for high-net-worth Individual Giving and Legacy giving.

**Legacy giving**

* Inspire colleagues, volunteers and supporters to understand the importance of gifts in Wills to St Michael’s Hospice.
* Deliver local and collaborative national campaigns to raise awareness of gifts in Wills and increase pledges, working closely with the Marketing and Communications Team.
* Secure solicitors to deliver face-to-face Will writing through Write a Will months or year-round Will writing through commercial agreements for mutual benefit.
* Be the first point of contact for any queries regarding writing a Will or leaving a gift in a Will.
* Manage the online Will writing scheme.
* Champion legacy giving across the organisation, including regular training and workshops.
* Plan and deliver supporter events to encourage gifts in Wills, working with experts for delivery of advice around estate planning.
* Plan supporter journeys and deliver events to nurture legacy pledgers to ensure they are kept informed of Hospice developments and remain committed to supporting St Michael’s.
* Help write and shape engaging and emotive copy for appeal letters, emails, newsletters and other promotional materials.
* Ensure metrics in place to monitor and measure performance, keeping close tabs on any variances from the KPIs set, remedying any shortfalls, and proposing remedial activity to ensure goals and budgets are achieved

**Legacy administration**

* Work with the Administrators and Director to ensure pledges and gifts are recorded effectively on the CRM database and managed in accordance with GDPR and Data Protection legislation.
* Support the Director to ensure timely communication with solicitors, executors and next of kins in response to notifications of gifts and expressions of gratitude.
* Identify opportunities for acquiring stories of legacy giving for future campaigns and promotions.
* Keep up to date with new developments, legalities, codes of conduct, best practice and trends.
* Manage the online Will writing scheme under Legacy giving.

**Individual giving with high value donors**

* To work with the Director to formulate a plan of activity to attract new donors giving £1,000 plus
* To work closely with the Supporter Care and Insights Manager to segment data and provide data analysis to inform campaign approaches. Interpret campaign results in order to make recommendations on future strategy and targeting. Identify and make recommendations for improving retention rates and lifetime value through data analysis, ensuring a greater return on investment and better supporter experience.
* Assist the Trust and Foundation Executive with high value applications in busy periods.
* To assist the Director in arranging Major Donor events to either attract new support or nurture existing supporters.
* To ensure donors are thanked in a timely manner.

**Person Specification**

1. **Specialist knowledge and experience**

**Essential**

* Demonstrable experience in relationship management.
* Track record of successfully managing and developing relationships with individual supporters, customers or clients.
* Knowledge and experience of Will writing and legacy giving
* Experience of working with high-net-worth individuals.
* Knowledge of regulatory environment for fundraising from individuals including data protection, Gift Aid and fundraising codes of practice and regulation
* Experience of and resilience to meeting targets and KPIs.
* A proven track record of success in working with others and delivery of high-quality results to deadlines
* Good knowledge of data selection, data analysis, insight and application of datasets for maximum success
* Experience of project management to deliver supporter events.

**Desirable**

* Experience using Raiser’s Edge or a similar CRM database.
* Experience of fundraising and the charity sector.
* Experience of securing high value gifts.
* Educated at degree level or equivalent experience

1. **Skills and behaviours**

**Influencer** Motivates and encourages others to support the Hospice.

**Planning and Organising:** Organises own time effectively and creates own work schedules. Prioritises and prepares in advance. Sets realistic timescales.

**Communication:** Speaks confidently and fluently. Talks at a suitable pace and level. Holds others’ attention when speaking. Writes fluently, clearly and concisely. Adapts own written communication style to suit others.

**Team Working:** Fits in with the team. Develops effective and supportive relationships with colleagues. Is considerate towards them and creates a sense of team spirit.

**Commercial awareness:** Understands and applies commercial and financial principles. Views issues in terms of costs, profits, markets and added value.

**Creativity and innovation:** Creates new and imaginative approaches to work-related issues. Identifies fresh approaches and shows a willingness to question traditional assumptions.

**Flexibility:** Successfully adapts to changing demands and conditions.

**Resilience:** Maintains effective work behaviour in the face of setbacks or pressure. Remains calm, stable and in control of themselves.

1. **Special conditions**

* Full driving licence and must be prepared to travel throughout county
* Must be able to work occasional evenings and weekends for event delivery – time in lieu will be given.

**Our Values**

***“What matters to you is what’s important to us”***

To ensure we deliver upon this every day, we empower people to work collaboratively to reach the **best possible decisions**, realise them in the **best possible way** and at the **best possible time**.

**We value:**

Knowledge, judgment, and kindness in reaching the **best possible decisions**

Courage, integrity, and passion in realising those decisions in the **best possible way**

Honesty, empathy, and determination in doing so at the **best possible time**.

Living our values influences **the way we behave**. The way we behave informs **the way we do things**. The way we do things is **the St Michael’s way**.

**Equal Opportunities Statement**

At St Michael’s Hospice we are committed to an equal opportunities approach in everything we do. This means that we seek to ensure anyone connected with St Michael’s, from patients and families through to donors, supporters, volunteers and staff are treated fairly, appropriately and with dignity and respect.

October 2024