

Legacy Lead



The Hospice of St Francis Charity provides essential free care across West Hertfordshire and South Buckinghamshire and inspires people to raise over £5million every single year to fund this care. Our care at home and in the Hospice, delivered through inter-disciplinary teams and skilled volunteers is rated outstanding by the Care Quality Commission. As a local employer we aspire to meet this 'outstanding' rating in all aspects of what we do, from the experience of staff and volunteers through to our compliance with the corporate, financial, fundraising, charity and trading regulations for our business.

Permanent 30 Hours Per week – Band 6

Accountable to: Director of Fundraising

Direct Reports: Dotted line oversight for Regular and Mid-Level Giving Officer

Main duties and responsibilities:

As the Legacy Giving Lead you will develop and establish a Legacy Giving programme for The Hospice of St Francis. Currently, legacy income generates on average £1 million a year, but we are ambitious about growing this.

Reporting into the Director of Fundraising, and with responsibility for all legacy income you will develop and execute a high-performing Legacy Giving programme that will deliver strategic, sustainable income and play an important part in ensuring the Hospice can continue to provide care to the community.

Working closely with fundraising, communications and clinical colleagues, you will personally identify, cultivate and steward legacy pledgers by creating and delivering an engaging and impactful stewardship and marketing programme that raises awareness of the impact and importance of legacy income and encourages new pledges. With a solid understanding of the administration of wills, you will also liaise with executors and professional advisors to ensure the sensitive and timely administration of legacies.

You will advise colleagues and the Board internally on forecasting for Legacies at the Hospice and along with the Director of Governance and Wellbeing, act as a key focal point and champion for Legacies in the Hospice community.

This is an exciting opportunity for a Legacy Giving specialist to curate a new legacy programme, building on previous work, to grow income for the future.

Strategy Development

- Develop and deliver an ambitious Legacy Giving strategy and operational plan, driving sustainable income growth and achieving KPIs
- Develop and implement associated objectives, workplans and KPIs to track progress
- Work closely with stakeholders, to curate and implement compelling legacy marketing plans to promote awareness of gifts in wills and recruit new pledgers

Management of Legacy Programme

- Responsible for ensuring legacy programme meets annual targets, with appropriate stretch targets in place
- Work collaboratively across fundraising, volunteering, trading, wellbeing and clinical services, to drive growth in the identification and cultivation of new legacy pledgers

- Organise legacy events to support cultivation and stewardship of legacy givers
- Provide exceptional stewardship of legacy pledgers individually and collectively, through the development and implementation of a legacy stewardship programme
- Sensitively and expertly manage legacy administration at the Hospice, including communication with executors and professional advisors as required, exploring and initiating stewardship and impact reporting activities in this realm
- Collaborate on and personally take steps to maximise existing initiatives such as Make a Will Month and the National Hospice Legacy Campaign, and identify new opportunities to market legacies and grow pledgers
- Lead on developing and leading initiatives to improve awareness of legacies amongst Hospice staff, volunteers and the Board
- Collaborate with and delegate activities, as appropriate and in agreement with AD of Development to the Regular Giving Officer

Strategic Leadership

- Act as an Ambassador for Fundraising and for the Hospice of St Francis internally and within the local community
- Take personal and collective responsibility for ensuring legacy fundraising is conducted in a legal and ethical manner in line with Charity Commission guidance, and other regulators as appropriate
- Advise and effectively manage income targets and expenditure budgets, including reforecasting and target setting
- Identify and develop strategic opportunities across fundraising, championing new initiatives and ways of working as necessary
- Serve on the Fundraising Leadership Group and take responsibility for developing and implementing cross-cutting department objectives and workstreams
- Engage strategically with the Income Generation Committee and Board of Trustees

Qualifications, Skills, Experience, Knowledge & Approach	Essential <ul style="list-style-type: none"> • At least five years' experience of delivering a Legacy Giving programme • Experience of successfully driving acquisition of new legacy pledgers, including through close-collaboration with other fundraising income streams and operational/volunteering teams • Experience of relationship management in fundraising and developing supporter journeys • Strong understanding of the practical implications of legal and financial aspects surrounding bequests and gifts in wills • Experience of developing and producing legacy marketing and stewardship materials • Experience of developing and effectively managing income and expenditure budgets, including forecasting for legacy income • Knowledge of key trends affecting legacy fundraising and able to apply insights to own work • Experience of developing and tracking progress using KPIs
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This list of tasks and responsibilities is not exhaustive, other relevant and appropriate duties as required by the Manager may be required. This Job Description will be reviewed and can be amended by agreement with the Post Holder and Manager.

	<ul style="list-style-type: none"> • Experience of using and a CRM database, and of developing systems and processes to ensure good donor management • Working knowledge of the Code of Fundraising and Data Protection laws • Strong project management skills and ability to manage multiple, complex projects simultaneously • Experience of executing legacy awareness initiatives internally and externally • Experience of running stewardship and cultivation events <p>Desirable</p> <ul style="list-style-type: none"> • Experience working with professional advisors such as lawyers, accountants and wealth managers • Experience of working within or with a matrix management structure with dispersed accountability for income • Operational understanding and experience in in-mem, regular giving and mid-value programmes • Previous experience of successfully delivering legacy fundraising in a Hospice setting • Knowledge of DonorFy <p>Fundraising qualification – Certificate in Charity Legacy Administration or Certificate in Legacy Fundraising</p>
Key Accountabilities, Responsibilities & Tasks	
Communication	<ul style="list-style-type: none"> • Strong written and verbal communication skills • Ability to develop and present an emotive and compelling case for hospice care • Excellent interpersonal skills with ability to build relationships and negotiate with internal and external stakeholders • Celebrate successes within legacy fundraising and broader fundraising department across the Hospice • Ability to manage difficult and sensitive situations, and negotiate to reach a conclusion • Deliver inspiring leadership across fundraising department
Internal & External Contacts	<ul style="list-style-type: none"> • Build strong working relationships within the fundraising team, and forge collaborative ways of working in particular with Communications, Wellbeing, Clinical Services and Finance teams • Build trusted and transparent relationships with donors, prospects, volunteers and the Board • Ability to deal sensitively with hospice patients, their families, and people who are newly bereaved
Decision Making	<ul style="list-style-type: none"> • Analytical thinker with ability to make data-informed decisions • Ability to manage own workload and strategically prioritise in the face of competing

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	<p>demands on resource</p> <ul style="list-style-type: none"> • Take ownership for area of work, with minimal support • Ability to track and evaluate progress and take action to respond to changing internal/external environment in order to achieve objectives • Ability to influence decisions to achieve desired outcome for area of work, whilst remaining pragmatic and considered of operating context • Proactive and operate with a solutions-focused approach • The post holder is required to apply the level of judgement commensurate with role, act at all times in the best interests of the Hospice in accordance with the Nolan Principles of Public Life. • Understanding of and management of reputational risk, including execution of due diligence screening as required
Mental and Physical Consideration. Working Conditions & Environment	<ul style="list-style-type: none"> • Commitment to the aims and ethos of the Hospice • Strong personal awareness and empathy, and ability to manage sometimes challenging emotional situations • Able to work flexibly in order to deliver role including maintaining regular presence at the Hospice – likely to require some evening or weekend working, and travel to meet supporters and prospects
Health & Safety	<ul style="list-style-type: none"> • Understand and comply with all Health and Safety, Fire and Infection Control regulations • Complete all mandatory training and ensure compliance of direct reports and contractors
Safeguarding	<ul style="list-style-type: none"> • Act in a manner at all times to safeguard the interests of individual patients/clients and their families and justify public trust and confidence in the Hospice of St Francis

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