

Interim Legacy & In Memory Lead (Maternity Cover)

Role Description

Division:	Fundraising & Marketing
Department:	Marketing
Location:	Scotland based, with a blend of office (Edinburgh) and home working
Geographical focus:	Scotland-wide
Contractual status:	Fixed term maternity cover for an initial 9 months (up to a possible 12 months)
Hours:	21-35 hours per week, flexible working patterns available
Line Manager:	Marketing Manager
Direct Reports:	None
Salary:	Full time salary of £36,500 - £38,374.45 pa pro rata (depending on experience)

Job Purpose

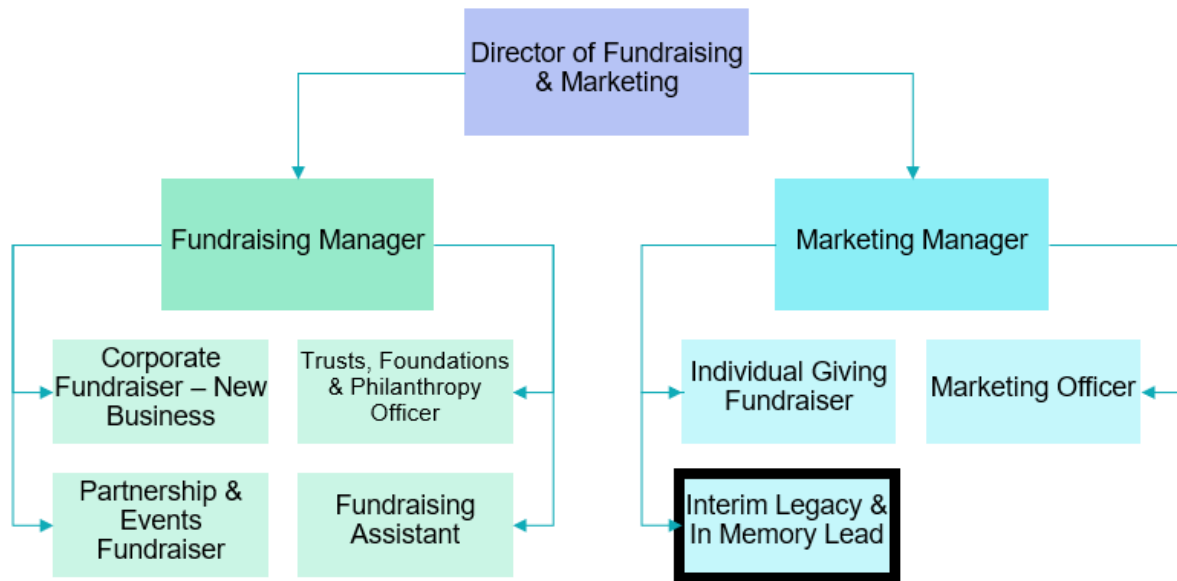
Our vision is that no one should face the challenges of older age alone. To help us achieve that, our Interim Legacy and In-Memory Lead will drive legacy and in-memory fundraising to successfully increase legacy pledges and donations and raise our profile and impact.

As Interim Legacy and In-Memory Lead you will raise awareness of the importance of legacies and in-memory giving to our work, showing the impact and the difference these make to the older people we support, both now and in the years to come. You will lead the delivery of planned activities and promotion of legacy and in-memory giving to achieve income targets and increase legacy pledges.

Living our core values you will play a key role in achieving our income targets and raising our profile.

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Team Structure



What you'll do

Legacy and In-Memory Marketing:

- Develop and implement a strategy to grow income from legacy and in-memory giving, delivering income targets and meeting agreed performance indicators.
- Lead and deliver the creation of legacy and in-memory cases for support.
- Lead on creating and implementing multi-channel legacy campaigns to recruit new legacy and in-memory supporters and increase the number of legacies notified from these sources.
- Lead the delivery of planned activities and campaigns and promotion of legacy fundraising to achieve ambitious targets and grow the active support base.
- Develop relationships with solicitors to secure new legacy pledges and in-memory donations.
- Work closely with the Individual Giving Fundraiser to market legacies to our warm donor base.
- Lead the development of a donor journey for legacy pledgers.
- Develop and update information, guidance and relevant collateral to individuals considering leaving a legacy gift to the charity.
- Develop and drive forward campaigns to promote the free Will writing service.
- Deliver talks to audiences that fit the target legacy supporter profile.
- Evaluate all campaigns and prepare reports and recommendations for the development of legacy fundraising based on data and insight.
- Build relationships with staff and volunteers to ensure they understand the importance of legacy income to the charity and equip and motivate them to promote legacies regularly, and with confidence.

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- Identify opportunities for income growth and lead, contribute to, and drive forward cross-organisational projects that improve the Individual Giving and Legacies Programme.

Legacy administration and processes:

- Continuously develop and review annual and longer-term budgets, ensuring KPIs are monitored and reported back monthly and quarterly.
- Forecast and project legacy and in-memory income.
- Review and take action to optimise expenditure, drive income and meet organisational objectives.
- Ensure accurate records of legacy income are maintained on Beacon and warmly thank donors and pledgers for their support ensuring an exceptional level of donor care.
- Liaise closely with the finance team to ensure the proper accounting, and where appropriate, the restricting of legacy income.
- Lead the process of the administration of complex cases including scrutiny of sales of properties and investments, ensuring funds are maximised in line with the legator's wishes.
- Ensure the administration of legacies is kept up to date and strong relationships with executors and next of kin are developed.
- Liaise with co-beneficiary charities, building effective relationships to ensure the proper and timely receipt of funds.
- Ensure all activity is run in compliance with the Chartered Institute of Fundraising codes of practice.
- Maintain accurate and up to date records and accept responsibility for the safe and secure handling and storage of confidential information, and in accordance with GDPR and Age Scotland's own data protection policies.

Other Duties:

- Contribute to development of the fundraising annual plan to drive forward the charity's ambitious plans for growth.
- Attend, present and participate in events and meetings, as appropriate, to represent and promote Age Scotland's interests.
- Work collaboratively with colleagues to ensure that each income stream feeds into and supports others so that funds are maximised.
- Focus efforts where the returns are greatest, ensuring delivery against budget.
- Ensure that all activities are carried out in accordance with relevant legal and regulatory conditions.

What you'll bring

Experience:

- Experience within a similar role.
- A successful track record in legacy and in-memory fundraising and of securing legacy fundraising income and meeting targets.
- Experience of delivering legacy and in-memory marketing activity using the full marketing mix, both traditional and digital.

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- Experience of ensuring activities and fundraising materials are in line with brand and tone of voice.
- Experience of completing administrative legacy processes (desirable)
- Experience of storytelling and demonstrating the impact of legacy donations.
- Building relationships with solicitors, executors and next of kin of legacy donors.
- Writing engaging and impactful communications.
- Working in a target driven environment.
- Experience of monitoring budgets.
- Experience in project management, reporting and analysing results (desirable).
- Use of Beacon CRM database (desirable).

Qualifications:

- Member of the Chartered Institute of Fundraising (desirable).

Knowledge, Skills & Qualities:

- Knowledge of GDPR and fundraising best practice.
- Good organisational skills, ability to work flexibly, prioritise workloads, manage competing demands and work under pressure and to tight deadlines.
- Able to manage your own workload and priorities to agreed deadlines.
- Excellent communication skills – both written and oral – and the personal presence to communicate to a variety of audiences, including at boardroom level.
- Capacity to inspire, influence and motivate others.
- Ability to network and create good working relationships with people and organisations at all levels.
- Knowledge and demonstrable experience of managing relationships and developing them for the greater good of the charity.
- Ability to deal with information in a confidential manner and respond with sensitivity.
- Team approach.
- Competent user of Microsoft Office applications, including Excel, Word, Outlook and Teams.

Additional requirements

- Desire to seek out professional development opportunities and to shadow other fundraisers to learn and grow.
- The role requires occasional travel in Scotland and the wider UK, involving possible overnight stays.
- Commitment to the aims and vision of Age Scotland and the ability to demonstrate our values (Empowering, Inspiring, Inclusive & Integrity) in your work.
- Commitment to work alongside and support volunteers.
- An understanding of and commitment to equal opportunities.
- Willingness to work from the Edinburgh Office as part of your role (NB, travel costs from home to the office will not be reimbursed by Age Scotland.)
- Employees are expected to have a suitable homeworking space with a good broadband connection for occasional home working.

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- Employees are expected to undertake any and all other reasonable and related tasks allocated by their Line Manager.
- Employees enrolled in Multi-Factor Authentication (MFA or 2FA) will be expected to install and maintain an app on either their personal or work mobile device.