



Children's Hospices Across Scotland

JOB DESCRIPTION – LEGACY AND IN-MEMORY GIVING DEVELOPMENT MANAGER

Job Details

Job Title – **Legacy and In-Memory Giving
Development Manager**

Responsible to – **Head of Community
Fundraising**

Job Family –

Location – **Glasgow, Edinburgh, Kinross or
Aberdeen**

Salary – **CHAS Band 6**

Job Purpose

Working within the CHAS values, leads, creates and delivers a legacy and in-memory giving strategy that increases the overall Lifetime Value of CHAS supporters, through growing legacy inquiries, pledges, gifts in Wills and in-memory income.

In partnership with colleagues across the organisation, works to build our supporter pool through excellent stewardship and relationship development, ensuring all supporters experience the joy of giving and are inspired to leave a gift in their Will to CHAS.

Main Tasks

- Legacy and in-memory giving strategy creation
- Legacy and in-memory giving marketing and promotion
- Team leadership and development
- Resource management
- Market Insight
- Administration

Job Activities

Strategy Creation and Implementation

- Develops and implements the legacy and in-memory giving growth strategy, including identifying areas for growth, activities and success measures
- Drives the development of a compelling case for support and proposition ensuring the integration of legacy messaging and in-memory/tribute fund products across all teams in CHAS, ensuring opportunities to promote legacy giving are capitalised
- Leads the Legacy and In-Memory Giving Team in the development of the annual budget and the annual review of the legacy and in-memory strategy, ensuring the team are fully aware of their individual roles and contributions

- In conjunction with the Head of Community Fundraising, monitors, evaluates and reviews the Legacy and In-Memory Giving Team's progress against objectives, ensuring constant progress towards delivery and service improvement
- As part of the Community Fundraising Management Team (CFMT), contributes to the wider Community Fundraising Development Strategy
- As part of the Fundraising and Communications Management Team, contributes to the CHAS Fundraising Strategy

Legacy and In-Memory Giving Marketing and Promotion

- Works with the CRM (Database) Marketing Manager and other colleagues to develop insight that identify potential legacy givers and inspire them to give to CHAS
- Works with the Supporter Care Manager and other colleagues to develop a highly effective supporter journey, delivering complex legacy and in-memory giving communications in conjunction with the Fundraising Campaigns Manager and other colleagues through multiple channels including direct mail, face to face and events
- Promotes the importance of legacy and in-memory giving internally at CHAS through staff and volunteer networks
- Works closely with the Communication, Supporter Engagement, Community Fundraising, and Partnerships and Philanthropy Teams to ensure legacy messaging is integrated through all supporter communications

Team Leadership and Development

- Responsible for the supervision of and delegation within a team of staff and volunteers, ensuring that individual skills are utilised appropriately, training needs are identified and organisational standards are maintained
- Responsible for managing and conducting staff review and development meetings, identifying areas for development and ensuring the maximum contribution towards legacy and in-memory giving objectives and organisational goals
- Ensures legacy and in-memory giving messaging and promotion are embraced and understood across CHAS through close working with Fundraising and Communications managers, and other senior staff across the organisation

Resource Management

- Manages the recruitment and selection of all staff and volunteers to the Legacy and In-Memory Giving Team, in accordance with CHAS's recruitment and selection policy and procedures
- Manages staff and resources, ensuring the effective delivery of legacy and in-memory giving fundraising activities
- Contributes to the development and management of the expenditure budgets for the Community Fundraising Development Team by providing information on actual and projected income and expenditure
- Works closely with the Head of Community Fundraising, Director of Development and Communications and colleagues in the Finance Team to ensure the best decisions for CHAS are taken in relation to estates, within the agreed delegation framework

Market Insight

- Ensures CHAS has access to the most up to date market trend reports and insight to inform our legacy and in-memory giving decision making
- As appropriate, participates in legacy and in-memory giving research providing data on giving trends on CHAS's behalf

Administration

- Works with the Supporter Engagement Team to ensure the input, maintenance and extraction of data from the fundraising database (Raiser's Edge) is accurate, fit for purpose and practice is compliant with legislation and CHAS standards
- Provides regular reports to the Head of Community Fundraising and Director of Development and Communications on legacy and in-memory giving performance against budget and sector trends

Health and Safety

- Responsible for coaching staff, adhering to and monitoring compliance with the CHAS Health and Safety Management Policy and associated procedures and co-operating with CHAS in complying with its legal duties.
- Reporting and investigating accidents and incidents as required by the Head of Community Fundraising Development

Information Governance

- Responsible for coaching staff, adhering to and monitoring compliance with the CHAS Information Governance Framework and associated policies and co-operating with CHAS in complying with its legal duties.
- Ensure that CHAS is compliant with sector guidelines around the recording and holding of legacy pledges to maximise our ability to communicate with these supporters

Volunteer Engagement

- Recruit and manage a team of volunteers, including providing training, day-to-day support, planned supervision and ensuring the volunteers deliver a quality service and feel valued

Dimensions

Financial

- Authorised to sign off payments within agreed governance level (e.g. to the value of £1,500)
- Regularly deals with invoices and staff and volunteer expenses
- Creates and manages budgets related to CHAS legacy and in-memory giving marketing
- Has delegated responsibility for decisions around legacy's within the agreed delegation framework
- Regularly responsible for handling donations

Stakeholders

- Has frequent contact with the Legacy and In-Memory Giving Coordinator, Head of Community Fundraising, Director of Development and Communications as well as the wider Community Fundraising Development Team, Supporter Engagement Team, Fundraising and Communications Managers, volunteers and supporters giving gifts in memory of a loved one
- Works with CHAS Family Support Team, Hospice Support Managers and Hospice administrators, particularly in relation to families who have used CHAS services making donations in memory of their child
- Attends, and actively contributes to, regular Community Fundraising Development Team meetings, Fundraising and Communications away days and has involvement with Fundraising working groups as required

Staff/Volunteers

- Direct Line management responsibility for staff in the legacy and in-memory giving team
- Delegated responsibility for a team of legacy and in-memory giving volunteers

Decisions and Communications

Decisions

- Works with a high degree of autonomy within the agreed management structure of CHAS, the Fundraising Codes of Practice and the Voluntary Services Guidelines
- Makes day-to-day and longer-term decisions regarding the monitoring and controlling of the Legacy and In-Memory Giving Team's budget
- On a daily basis, directly manages the work of the Legacy and In-Memory Giving Team, ensuring individual skills are utilised appropriately and that organisational standards are maintained
- On a daily basis, oversees the devolved management of work for the volunteers, ensuring individual skills are utilised appropriately and that organisational standards are maintained

Communications

- On a daily basis, responds to complex and sensitive legator information and will have to communicate clearly and at times assertively with internal and external stakeholders to ensure the wishes of the deceased are carried out while being sensitive to surviving family and friends
- Develops and maintains relationships with CHAS staff, supporters, families, lay-executors solicitors and peers in other charities to ensure effective and efficient legacy and in-memory giving
- Regularly has contact with Solicitors, Legal Representatives, Executors, Charities and other co-beneficiaries
- Regularly has contact with professional and regulatory bodies (OSCR, ILM, Law Society Scotland, Revenue Scotland), Service suppliers (Smee & Ford) and Membership Bodies (Remember a Charity) and supporters interested in making inquiries on leaving a gift to CHAS
- Builds ongoing relationships with CHAS supporters to ensure maximum life time value to CHAS through excellent stewardship
- Skilled at building peer relationships to ensure legacy and in-memory marketing and promotion is embedded across the Fundraising and Communication function
- Communicates highly complex information about the legacy and in-memory giving function to the Director of Development and Communications, the Head of Community Fundraising, the Community Fundraising Team members, the Chief Executive, the Senior Management Team, the CHAS Board, existing and potential supporters, the media and sector, professional and umbrella bodies



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PERSON SPECIFICATION – LEGACY AND IN-MEMORY GIVING DEVELOPMENT MANAGER

Education, Qualifications, and Training

Essential

- Educated to degree level or equivalent
- Certificate in fundraising, or equivalent professional qualification

Desirable

- None

Method of Assessment – Application Form

Skills, Abilities, and Knowledge

Essential

- Exceptional communication skills required to deal with professional audiences with credibility, as well as engage staff, volunteers and CHAS supporters interested in making a gift in their Will in an appropriate and effective manner
- Demonstrable commitment to continuous professional development
- Demonstrable experience of managing the human, physical and financial resources of a team
- Demonstrable working knowledge of Microsoft Office or similar packages
- Demonstrable working knowledge of Raiser's Edge or equivalent CRM system

Desirable

- None

Method of Assessment – Application Form and Interview

Experience

Essential

- Demonstrable experience of legacy and in-memory giving strategy creation
- Demonstrable experience of legacy and in-memory giving marketing and promotion
- Relevant experience of working within the fundraising sector and evidence of a high level of knowledge of the legislative and regulatory framework, for fundraising within Scotland
- Experience of fundraising or communicating with professional and bereaved audiences and with dealing with sensitive subjects

Desirable

- None

Method of Assessment – Application Form and Interview

Personal Qualities

Essential

- Acts with integrity
- Works co-operatively with colleagues to improve service
- Forms meaningful relationships with others
- Demonstrates initiative and acts with effectiveness
- Accountable for own actions and decisions
- Commitment to ongoing learning and development
- Commitment to CHAS core value, vision and purpose
- Commitment to working with/supporting volunteers
- Professional attitude to work
- Views change as a natural, positive and a continuing process

Desirable

- None

Method of Assessment – Interview

Other Requirements

Essential

- Full driving licence

Desirable

- None

Method of Assessment – Application Form and Interview