



We're looking for a Legacy Manager

Salary: £40,000

Base: Central Edinburgh

Hours: Permanent. The working week will be 35 hours with core working hours between 10am - 3pm, Monday to Friday, with a one-hour lunch break. A flexible working policy is offered. The office is open from 7am – 7pm daily and we are currently undergoing an initial test of hybrid working. All full-time, office-based staff are required to work at least two days per week in the office.

Benefits: Pension scheme with a 10% employer contribution. 33 days' paid holiday annually, plus four public holidays as paid leave days each year over Christmas and New Year. A Cycle to Work scheme is available.

Who are we? Worldwide Cancer Research is the UK charity that will end cancer by starting cancer cures worldwide.

Sadly, 1 in 2 people in the UK will be diagnosed with cancer in their lifetime. For us, that's 1 in 2 too many.

Being a small charity with currently 44 employees allows us to be open, honest and personal with our supporters. Everyone who works for the charity plays a significant role – without them we wouldn't exist.

Worldwide Cancer Research is a small charity with an immense ambition – to end cancer by starting new cures. We find and fund discovery research to start new cancer cures around the world, and we are committed to opportunity without barriers. All applicants will receive equitable, fair treatment, and we have pledged to 'Show the Salary' - because our team members are at the heart of everything we do.

We welcome applications from all communities to help build an inclusive team - as diverse as the scientific community we fund and the families whose lives we impact.

Scientists across the world are ready to conquer cancer. To help start more cancer cures and save lives, we are looking for a Legacy Manager to join the Marketing and Fundraising team at Worldwide Cancer Research, to help the charity deliver their Legacy growth strategy and marketing programme.

Key information about the role

Our Legacy Manager will be responsible for the delivery of our legacy growth strategy and marketing programme as a key strand of our plans to fund £20m of cancer research annually by 2030. The role will deliver our end-to-end recruitment and retention plans, as well as administration of all legacy gifts.

How to apply

- **Please email your tailored covering letter and CV (no more than two pages) outlining your suitability for this role to recruitment@worldwidecancerresearch.org**
- **Please note your covering letter will be key to the success of your application.**
- **Closing date is, Monday 21 February 2022.**
- **Interviews will be held 2 March 2022.**

Additional information

Worldwide Cancer Research will hold applicant data on file for six months after the end of the relevant recruitment process. At the end of that period your data is deleted or destroyed.

For administrative purposes, please state where you first saw this job advertised.

Please view our recruitment privacy notice at:

<https://www.worldwidecancerresearch.org/our-organisation/careers-at-worldwide-cancer-research/>

Post: Legacy Manager

Responsible to: Head of Fundraising and Philanthropy

Key contacts/relationships:

External: Supporters and Curestarters, lawyers and professional executors, next of kin, co-beneficiaries, partner agencies from supplier framework, Worldwide Cancer Research Scientific Advisory Committee and grant holders

Internal: All Worldwide Cancer Research teams, including Senior Management and Trustees

Purpose

In line with our fundraising growth plan, the Legacy Manager is responsible for delivery of our legacy growth strategy and marketing programme as a key strand of our plans to fund £20m of cancer research annually by 2030. The role will deliver our end-to-end recruitment and retention plans, as well as administration of all legacy gifts.

Key responsibilities:**Legacy programme**

- Plan, implement and deliver the legacy growth strategy through annual operational and marketing plans to acquire, retain and develop legacy supporters
- Manage and develop all elements of the legacy supporter journey including pipeline development from enquiry generation to final gift, communications, events, promotions and stewardship
- Develop, monitor and manage the legacy budget, providing adequate commentary to the Head of Fundraising and Philanthropy and Finance team
- Nurture good relationships with legacy prospects, ensuring they receive a high standard of stewardship and supporter experience
- Manage supporter relationships using the CRM system
- Champion legacy giving across the charity, ensuring #teamworldwide are aware of the importance of gifts in wills and prepared to promote this way of giving
- Keep abreast of broad sector trends and thinking, oversee research of competitor corporate activity and the latest marketing trends to ensure strategy matches opportunity

Legacy administration

- Represent the charity, as first point of contact for all legacy gift administration enquiries, ensuring professional, appropriate and effective communications within data protection guidelines
- Manage the legacy gift caseload and process associated documentation for all gift types, ensuring the charity receives its full entitlement in accordance with the provision of the Will, Codicils, Deeds of Variation or settlements, and the law
- Proactively liaise with co-beneficiaries and maintain working relationships with other charities where relevant
- Develop working relationships with professional executors, next of kin and lay executors
- Review estate accounts and ensure all estates have been administered correctly, including the allocation of Capital Gains Tax and Inheritance Tax
- Monitor and report on developments in legacy gift administration, legislation and practice

Reporting and analysis

- Monitor and manage all activities to ensure the delivery of income and expenditure targets by developing the relevant dashboards alongside the CRM team
- Provide operational and performance reports to the Head of Fundraising and Philanthropy, as well as wider reporting as required

Generic information for all roles

- The responsibilities within the job description are not exclusive or exhaustive. They highlight the major tasks and duties of the role, and the post holder may be required to undertake other duties that are consistent with the overall purpose of role.
- We expect every job description will be subject to an annual review. In addition, posts may be reviewed where requirements of the charity change.
- We expect every member of staff to be a role model to others within and external to the charity in the course of their duties, upholding the charity's values.

Person specification

Requirements	Essential	Desirable
Educational attainment	<p>Good level of literacy and numeracy – English and maths National 5 (or equivalent).</p> <p>Institute of Legacy Management training, certificates – CiCLA, and membership or be willing to work towards.</p>	
Experience required	<p>Understanding and knowledge of accounting principles relevant to legacies including current IoF fundraising code of practice. Working knowledge of the General Data Protection Regulation (GDPR).</p> <p>Experience of working in a similar role.</p> <p>Experience of acquiring and developing legacy supporters.</p> <p>Demonstrable experience of developing and delivering effective telephone and written communications with professional and lay executors, and industry colleagues.</p> <p>Demonstrable experience of scrutinising or collating accounts and interpreting financial information.</p> <p>Experience of creating reports, including financial and analytical reporting.</p> <p>Proven experience of managing multiple priorities, caseloads and deadlines.</p>	<p>Evidence of client or donor relationship development.</p> <p>Experience of checking IHT and CGT calculations.</p> <p>Working knowledge of relevant tax and charity law.</p>
IT experience	<p>Computer literate – experience of CRM, Microsoft packages especially MS Word, Excel and email.</p> <p>Experience in creating and maintaining electronic and manual records.</p>	<p>Experience of Raisers Edge, Salesforce, First-class. (Current system Salesforce).</p>
Skills and aptitudes required	<p>Excellent and professional communication skills with a range of audiences.</p>	

	<p>Sound judgement in responding sensitively and appropriately to emotional circumstances, including bereaved donors and executors.</p> <p>Highly numerate, able to understand and interpret information and, financial and data reports. Strong influencing and negotiation skills when dealing with solicitors and executors and the ability to remain calm under pressure</p> <p>Strong administrative and organisational skills and ability to use own initiative, work to deadlines and to re-prioritise.</p> <p>Willingness to undertake relevant training and qualifications.</p> <p>Empathy, confidentiality, honesty, reliability, discretion, integrity, and the wish to be a role model for the charity.</p>	
Interests	Interest in charity work.	Knowledge of Worldwide Cancer Research.
Other requirements	<p>Commitment to attend training courses to update knowledge and skills.</p> <p>Ability to travel throughout the UK if required for meetings/key events.</p> <p>An interest in and enthusiasm for the Charity's vision, mission and strategy.</p>	