

Role Description

Division:	Fundraising & Marketing
Department:	Fundraising & Marketing
Location:	Scotland based, with a blend of office (Edinburgh) and home working.
Geographical focus:	Scotland-wide
Contractual status:	Permanent
Hours:	Part time: 28 hours per week, flexible working patterns available
Line Manager:	Individual Giving, Legacies & Brand Manager
Direct Reports:	None
Salary:	£29,000 - £31,500 pa pro rata (£23,200 - £25,200 pa actual) depending on experience

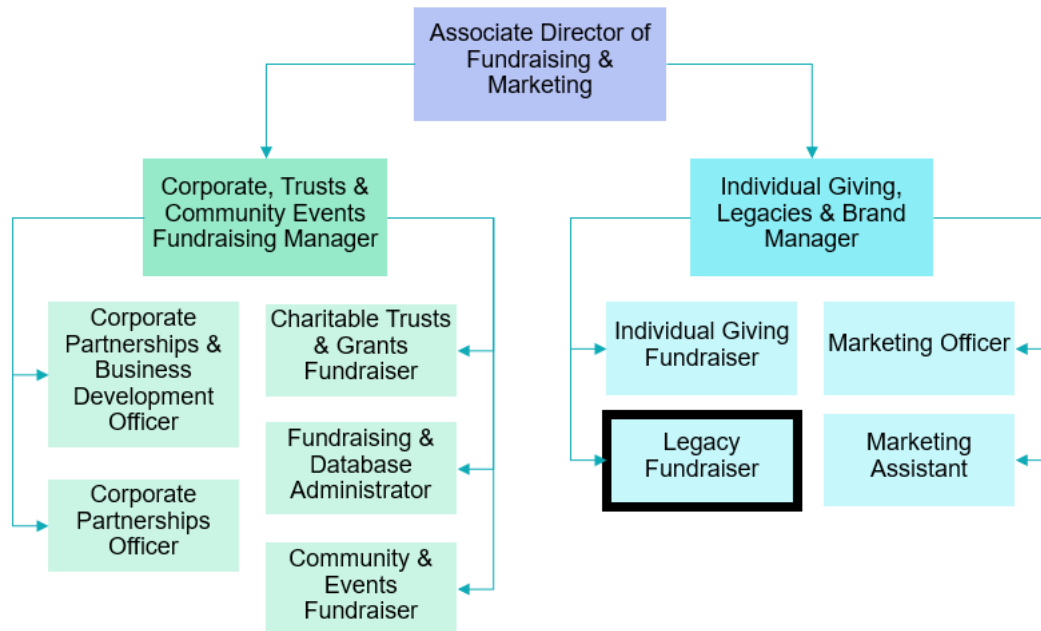
Job Purpose

Our mission is to inspire, involve and empower older people in Scotland, and influence others so that people can enjoy better later lives. To help us achieve that, our Legacy Fundraiser will lead legacy fundraising to successfully increase legacy pledges and donations and raise our profile and impact.

As a Legacy Fundraiser you will raise awareness of the importance of legacies to our work showing the impact and the difference these make to older people now and in the years to come. You will lead the delivery of planned activities and promotion of legacy fundraising to achieve income targets and increase legacy pledges.

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

Organisational Chart



What you'll do

Legacy Marketing:

- Develop and implement a strategy to grow income from legacies.
- Lead on creating and implementing multi-channel legacy campaigns to recruit new legacy 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 targets and grow the active support base.
- Develop relationships with solicitors to secure new legacy pledges.
- Work closely with the Individual Giving Fundraiser to market legacies to our warm donor base. Work together to develop the legacy donor journey.
- Provide information and guidance to those considering leaving a legacy donation to the charity.
- Develop campaigns to promote the free Will Writing Service.
- Deliver talks where audiences fit a legacy 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.

Legacy administration and processes:

- Work closely with the Associate Director of Fundraising and Marketing, Director of Finance and Individual Giving, Legacies & Brand Manager to project and forecast income.

Legacy Fundraiser

- Work closely with the Fundraising and Database Administrator to ensure accurate records of legacy income are maintained on Raisers Edge and to warmly thank donors and pledgers for their support ensuring an exceptional level of customer care.
- Liaise closely with the finance team to ensure the proper accounting, and where appropriate, restricting of legacies income.
- Work with our finance team, and our solicitors (where appropriate) on the administration of complex cases including scrutiny of sales of properties and investments, ensuring funds are maximised in line with the legator's wishes.
- Work with the finance team to 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:

- Minimum 2 years' experience within a similar role.
- A successful track record in legacy fundraising and of securing legacy fundraising income.
- Experience of delivering legacy marketing activity using the full marketing mix, both traditional and digital.
- Experience of ensuring activities and fundraising materials are in line with brand and tone of voice.
- Effective people management skills.
- Experience of completing administrative legacy processes.
- 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.

Legacy Fundraiser

- Experience in project management, reporting and analysing results (desirable).
- Use of a CRM database (desirable).

Qualifications:

- Member of the 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 homework space with a good broadband connection for occasional home working.
- 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.