# Job description

**Job title**: Head of Legacy and In Memory Fundraising

**Team**: Legacy and In Memory

**Department:** Fundraising

**Job location:** Andover or Home Based

**Reports to:** Associate Director of Fundraising and Marketing

## Overall purpose

Macular disease is the biggest cause of sight loss in the UK, with around 300 people diagnosed every day. The Macular Society is the only charity determined to beat the fear and isolation of macular disease with world class research, and the best advice and support.

To support people affected by macular disease now, the Macular Society provides a range of support, information and services. Our research programme is focused on finding new treatments and a cure to Beat Macular Disease forever.

## Organisational chart

This role will work closely with the Associate Director of Fundraising and Marketing to develop and implement strategy and plans that will ensure the growth of future Legacy and In Memory income and produce accurate reporting.

Organagram shows the Head of Legacies and In Memory reporting into the Associate Director of Fundraising and Marketing. Reporting into the Head of Legacies and In Memory are: Legacy Administration Consultant (freelance), Legacy and In Memory Officer (legacy administration lead) and Legacy and In Memory Fundraising Manager. Reporting into the Legacy and In Memory Fundraising Manager are a Legacy and In Memory Officer (fundraising lead) and a Legacy and In Memory Officer (in memory lead).

## Our values

We will beat macular disease by…

### Making It Happen - we are Ambitious

### Showing We Care - we are Supportive and Caring

* Knowing Our Stuff - we have Integrity and we act Honestly

## About the role

The Head of Legacies and In Memory will work with the Associate Director of Fundraising and Marketing to build and develop our vital legacy and in memory programme. The role will include the development of innovative and engaging marketing strategies - including recruitment and stewardship across legacies and in memory; investigating new audiences and channels and excellent budgetary management including detailed income forecasting.

Key elements of the role include:

* creating and implementing multi-channel campaigns: to recruit new legacy supporters from our warmest audiences and increase the number of legacies notified from these sources
* developing excellent stewardship plans for legacy enquirers, intenders and pledgers and for all in memory and tribute donors
* introducing new transformational projects and exploring new avenues and audiences for legacy and in memory giving, taking our reach beyond audiences we already know
* creating and implementing a detailed in memory and tribute fundraising plan based on analysis of donor sources, income and activity
* providing accurate, regular activity and income updates and forecasts to our Senior Leadership Team
* keeping up to date with trends across the sector and benchmarking performance against other charities, highlighting opportunities to grow engagement and income
* working with the Engagement team to agree design, messaging and marketing channels for new and existing audiences
* creating and evaluating strategic partnerships that help recruit new legacy and in memory supporters
* engaging with the Individual Giving, Community and Events and Regional teams in order to identify new legacy prospects and promotional opportunities
* engaging with the Community and Events team to encourage and develop fundraising in memory opportunities
* ensuring all collateral for legacy and in memory is developed and kept up to date, fresh and inspiring
* working with the team to develop excellence in donor care, analysing and improving donor journeys
* ensuring accurate records are maintained of all legacy gifts and any restrictions, and that all data held on the database(s) is compliant with GDPR
* ensuring that the organisation receives all income due from legacies in a timely manner, working with legacy administration colleagues to deliver to a high standard all administrative tasks and communications with solicitors and executors
* acting as a Gifts in Wills and in memory ambassador across the organisation, building awareness among staff, volunteers and trustees of the importance of legacy and in memory income, motivating them to promote it with confidence
* keeping up to date with best practice in fundraising and comply with relevant legislation

All our team members are expected to comply with Macular Society terms and conditions, rules, policies, procedures, codes of conduct, quality standards, authorisation processes, risk management policies and relevant external regulations.

**About you**

1. You will be committed to equality, diversity and inclusion in all aspects of our work.

2. Have an open and collaborative approach to work, helping us to achieve our Knowing our stuff value by working with integrity, making informed decisions to be the best we can be to Beat Macular Disease.

3. Be able to act with empathy, we provide a caring, approachable and supportive environment for all – we Show We Care by listening to each other and working together.

4. Be ambitious in your approach to help Make Things Happen, we are progressive yet supportive, and brave in our actions to make the progress that is needed to Beat Macular Disease.

5. Be happy to work in an organisation that puts those we support first, advocate for the Macular Society at all times, and be comfortable that all members of the team are fundraisers.

Specifically for this role you will have:

Knowing Our Stuff

* Proven experience and a successful track record at a senior level in legacy fundraising, including the creation, development and implementation of strategic fundraising plans.
* A credible senior professional with good influencing skills and a can do and hands on approach.
* Demonstrable ability to deliver against agreed financial and performance targets, timescales and objectives.
* Ability to produce accurate budgets and regular forecasts and to communicate complex financial information to senior management and Trustees.
* A high level of accuracy and an exceptional eye for detail across all areas of work.
* Up-to-date knowledge of legislation and best practice guidelines in relation to legacy and in memory fundraising.
* Ideally, an understanding of legacy administration, a working knowledge of First Class and a relevant post graduate qualification/fundraising diploma or membership of CIOF or ILM.

Making It Happen

* Excellent programme delivery skills and ability to manage diverse and demanding workloads.
* Ability to work independently under own initiative and cooperatively as part of a team.
* Ability to multitask and prioritise multiple projects and work streams.
* Excellent written communication skills and the ability to produce fundraising materials targeted to a legacy audience, that are inspiring, persuasive and informative.
* Excellent oral communication skills with the ability to present and speak with confidence, sensitivity, clarity and passion about Gifts in Wills and their impact on research and future plans.
* Awareness and understanding of trends around legacy and in memory and ability to combine this knowledge with data analysis to inform strategic and tactical approaches.
* Understanding of the principles of data protection.
* Strong IT skills including Word, Excel, PowerPoint, Outlook.
* Ideally, experience of event creation and organisation, legacy product and/or channel innovation, experience of digital fundraising together with knowledge of omnichannel mass marketing.

Showing We Care

* Proven ability to maintain confidentiality and demonstrate tact and diplomacy.
* Sensitivity, flexibility and ability to empathise when dealing with supporters, colleagues, lay executors and people who are bereaved.
* Experience of delivering excellent donor care and supporter stewardship programmes.
* Experience of managing an experienced and diverse legacy and in memory team, and of managing and evaluating partnerships with external suppliers and consultants.
* Excellent team working and collaborative working skills and the ability to develop effective partnerships.
* Commitment to high standards in all areas of work.
* Ideally, knowledge of and empathy with issues relating to sight loss and experience of working with a more senior audience group.

Eligibility to work in the UK:

Proof of identity and eligibility to work in the UK.

## Volunteering:

From time to time you may be asked to support / volunteer your time (TOIL available) at Macular Society events that take place outside of normal working hours.

## Safeguarding:

The Macular Society is committed to safeguarding and promoting the welfare of all children, young people and vulnerable adults with whom we work. We expect all of our employees and volunteers to demonstrate this commitment.

You are required to carry out other such duties as may reasonably be required, relevant to the role.

This job description is accurate as at the date shown below. In consultation with you it is liable to variation by the Macular Society to reflect or anticipate changes in or to the role.

**Annual leave:** 26 days plus bank holidays (pro rata for part time)

**Based:** Andover/Hybrid/Remote

**Contract Type:** Perm/Full Time

**Date of evaluation:** March 2024