### Role: Legacy and In Memory Fundraiser

**Hours:** 37.5

### Post holder: New Post

**Area of Work:** Fundraising

**Responsible to:** Senior Fundraiser

## **Mission:**

“We help local adults with complex, progressive illnesses from

diagnosis to the end of life through free, high quality,

specialist palliative care, advice and guidance,

and we support those close to them.”

**Department Vision:** To fund every service our patients and their families need.

**Department Mission:** We inspire, appreciate and help people so they support the Hospice as much as they can and feel great about it.

**Role within the Department:**

With the support of the Senior Fundraiser, the postholder will lead on the planning and implementation of our Legacy and In Memory strategy. You will manage our legacy and in memory campaigns, events and materials. Developing plans and processes to maximise income and build important relationships with a range of donors. The role aims to grow awareness and inspire action, increasing future income from legacies and in memory donations for Katharine House Hospice.

#### Function and Responsibilities

### Specific Objectives

1. Alongside the Senior Fundraiser, develop a compelling Legacy fundraising proposition to encourage support from existing and new supporters.
2. Build relationships with a range of external and internal stakeholders, creating legacy leads and converting to gifts in wills.
3. Develop key messages and tools to enable all staff to integrate legacies into their everyday conversations with supporters.
4. Deliver results through inspiring communications and promotional activity, bringing to life the work of Katharine House Hospice and driving legacy pledges.
5. Alongside the Senior Fundraiser, develop an effective In Memory strategy, monitoring existing activities and developing new opportunities.
6. Work closely with Marketing and Communications to sensitively use personal stories, images and testimonials to strengthen fundraising communications.
7. Monitor the income and expenditure budgets allocated to these activities

### Key Tasks and Responsibilities

*Detailed below are areas of activity, which the post-holder may be expected to carry out. The list is not exhaustive.*

1. Deliver the legacy marketing strategy including the annual ‘gifts in wills campaign’.
2. Work closely with the Senior Fundraiser to identify and pursue new opportunities to increase legacy and pledges and in-memory donations.
3. Monitor, analyse and produce regular reports on legacy and in memory giving and assist with development and reforecasting of budgets and KPIs.
4. Act as a ‘gifts in wills’ ambassador across the organisation, building awareness amongst staff, volunteers and Trustees of the importance of legacy income, motivating them to promote it with confidence.
5. Research, create and pilot legacy events.
6. Manage our online tribute pages and provide excellent stewardship to maintain strong relationships with supporters.
7. Working alongside the donations team to ensure personalised and accurate letters are produced for donors who have donated in-memory of someone
8. Manage the Hospice’s Heart of Memories sculpture including the up-keep of the sculpture itself, arranging new hearts and asking donors to renew existing agreements.
9. Collaborate with the Senior Fundraiser on the development and execution of our donor journeys with a view to increasing supporter engagement.
10. Maintain accurate communications and record keeping of donor activity on the database
11. Work closely with external agencies and providers e.g. Much Loved, Octopus Legacy, Hospice UK.
12. Keep up to date with trends across the sector and benchmark legacy and in memory performance with other charities, looking for opportunities to grow engagement and income.

### Other Tasks and Responsibilities

1. Work with other members of the fundraising team in a mutually supportive manner and develop and maintain good relations with staff and volunteers working in other areas of the Hospice.
2. Use all opportunities to raise the profile of Katharine House and increase public awareness in accordance with department procedures
3. Maintain high levels of professionalism in all undertakings
4. Maintain accurate records of all activities and ensure that they integrate with the whole fundraising function
5. Identify personal development needs, and means by which these may be achieved and undertake relevant training to maintain necessary skills and knowledge
6. Comply with all Katharine House Hospice policies and procedures and with all relevant legislation
7. There will be some out of hours work in relation to specific events. A level of flexibility will be required to meet the needs of the department.

**Job Revision**

This job description is not exhaustive and is subject to periodic revision in the light of service requirements or the post holder’s personal development

**Confidentiality**

To ensure confidentiality is maintained on all matters pertaining to patients, staff and the organisation in accordance with the Hospice’s Confidentiality Policy

**Accuracy of Data**

(This standard term applies to all staff, but is not expected to be relevant to this post)

The accuracy of Service User information is paramount regardless of its format (hard copy or electronic).  All staff collecting and processing sensitive patient or client information will be given suitable training.  All such data should be monitored for accuracy and reconciled between the user record and data held on systems that support the provision of care. Any errors or omissions should be identified and corrected.  Such activity will be undertaken under the guidance of the Director of Care.

**Health and Safety**

All employees have a responsibility to abide by the safety practices and codes authorised by Katharine House Hospice. They have an equal responsibility with management for maintaining safe working practices.

**Smoking**

The hospice has a no smoking policy. All hospice premises are considered No Smoking Zones

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| *Person Specification* | Essential | Desirable |
| *Qualifications*Fundraising qualification or equivalent |  | √ |
| *Experience & Knowledge*Experience working in a fundraising or marketing role, preferably in legacies, in memory, individual giving or direct marketing  * Past experience of working with financial budgets and KPIs * An understanding of developing relationships with donors or customers * Awareness of current fundraising trends and developments  Knowledge of fundraising legislation and codes of practice  * Proven ability to manage third party supplier relationships e.g. creative agencies, fundraising platforms * Experience of producing compelling fundraising messages. * Good knowledge and experience of using a fundraising database for reporting and analysis  Experience of using data analysis and insights to inform decisionsExcellent working knowledge of IT, to include Microsoft Office (Word, Excel, Outlook) and ideally some of the following: Teams, Planner, Sharepoint, CRM systems, MailChimp, intranets  * Demonstrate a knowledge of the work of Katharine House Hospice | √  √  √  √  √  √ | √  √  √  √  √ |
| *Skills and Attributes*Able to build strong relationships at all levelsProven track record of income generationFlexibility and adaptable to changeAbility to work on own initiative  * Excellent oral and written communication skills * Self-motivated and positive attitude * Ability to work under pressure and prioritise in a busy environment * Excellent personal organisation skills, including time and workload management.  Professional and approachableExcellent interpersonal skillsA team playerExperience of working with volunteersAn interest in the charitable sector and able to demonstrate an understanding of, and empathy with, the hospice sector | √ √  √  √  √  √  √  √  √ | √ √  √ |
| *Other*Commitment to equal opportunitiesShow respect for staff, volunteers and patients  * Flexibility to attend meetings outside of normal office hours | √√√ |  |