

Job Description

Job Title: Legacy & Grants Fundraising Lead

Hours of duty: 37.5 Hours

Organisational Arrangements

Accountable to: Director of Income Development and Marketing

Role Summary

A varied role responsible for developing, managing, and soliciting gifts from a portfolio of Trusts and Foundations and Major Donors. Working with the Director of Income Development & Marketing responsible for developing and delivering a Legacy Strategy for the Hospice.

The role requires achievement of financial and non-financial KPIs to ensure that the departmental targets are achieved. Managing a portfolio of existing and researching and securing new, supporters. Providing high level stewardship and account management through reporting, proactive engagement, and cultivation activities.

Applying knowledge of the Trusts and Foundations market, and /or Major Donors and Legacy giving, in order to secure five-six figure sum gifts. Building long-term effective relationships with senior stakeholders, both internal and external.

Key responsibilities:

- Lead on Trust and Major Donor relationships for the Hospice; identifying, cultivating and supporting relationships to secure agreed financial KPIs.
- Research and develop prospect pipelines based on key areas of work within the Hospice; moving supporters along the pipeline through a supported donor journey.
- Prepare asks through compelling applications, bid writing, cases for support, engaging presentations, and well prepared, goal-orientated meetings.
- Provide high level account management and stewardship to all supporters, ensuring repeat gifts, through reporting, proactive engagement, and cultivation activities.
- Develop and deliver a Legacy Strategy for the Hospice, focussed on marketing and stewardship, and ensure all legacy fundraising activities are compliant with relevant sector regulations.
- Work with the wider Fundraising team to ensure relationship led stewardship plans are in place for legacies, including an events calendar.
- Work with the Marketing & Communications Team to develop a suite of legacy marketing materials; and provide continuous evaluation and testing of the legacy marketing activity and messaging.

- Work with the wider Hospice team to imbed legacy messaging across Hospice products.
- Work with the wider Fundraising team to ensure that legacy income is accurately reported and the legacy pipeline is effective, maintaining good communication with Finance.
- Work collaboratively with both clinical and non-clinical colleagues across the Hospice to ensure oversight of delivery projects and attain relevant information for reporting and cultivation opportunities.
- Keep up-to-date on best practice within the charity sector generally and particularly changes to communications, legislation, GDPR and codes of practice.
- Represent the Hospice at internal and external events as required, and represent the team at a variety of meetings.
- Document all communications accurately on the Hospice CRM database.

Health and Safety/Security

1. To be familiar with all requirements of the Health and Safety at Works Acts and the Hospice Health & Safety policies and regulations applicable to the post.
2. To co-operate actively with the nominated Health & Safety person in achieving the aims of the Hospice Health & Safety Policy, Fire Regulations, related issues and various procedures and ensure the legal requirements are met.
3. To take responsible care the health and safety of themselves and of others who may be affected by their acts or omission, and comply with the Health and Safety legislation.
4. To wear appropriate safety clothing and use appropriate safety devices as requires, and not to interfere with or misuse anything which is provided in the interests of health and safety.
5. To report and co-operate with the investigation of all incidents and accidents that have led to or may lead to injury and to report all hazards or shortcoming in the protection arrangements.
6. To ensure as far as predictable that all materials used within the Hospice and its subsidiaries for fundraising activities are properly stored, used and disposed of and that any items of equipment are properly tested, used, maintained and repaired as necessary.
7. To oversee appeals and event Risk Management Assessments and ensure outcomes are acted upon.

Volunteers

Dr Kershaw's Hospice is generously supported through its active volunteers who work alongside employees of the Hospice, across all departments, helping to fulfil the needs of the services.

As part of all roles at the Hospice, it is expected that all post holders commit to assisting and supporting volunteers to perform their roles to the best of their ability. In addition, it may be required of the post holder to act as a volunteer lead if identified with the Volunteer Co-ordinator, as appropriate.

Education & Training

The post holder will:

1. Participate in the Hospice appraisal system.
2. Maintain high professional standards and continue own personal and professional development.
3. Assist in teaching and supervision of other members of staff and volunteers.
4. Participate in the orientation of new staff.
5. Attend all mandatory training/update sessions.

General

1. **Confidentiality** - It is a condition of employment that staff will not disclose any information obtained in the course of their duties other than to those entitled to receive it. The post holder must ensure that the confidentiality of personal data remains secure and the terms of the Data Protection Act and relevant Hospice policies are met in respect of information held on the Hospice computer system.
2. **Equal Opportunities** – The Hospice is committed to equality of opportunity. All staff are required to comply with current legislation and Hospice policies.
3. **Health and Safety** – Staff must ensure they are familiar with the requirements of the Health and Safety Work Act (1974) and the Hospice Health and Safety policies and regulations applicable to their post.
4. **Safeguarding** – Dr Kershaw's Hospice is committed to safeguarding adults and children and expects all staff to share in this commitment. Staff have a responsibility to ensure that they are aware of specific duties relating to their role and should familiarise themselves with the Hospice safeguarding policy. Regular safeguarding training updates will be held and are mandatory for all staff.

Due to the nature of the organisation you will undertake any other reasonable tasks or duties that are deemed to be within your capability, to meet the needs of the organisation's services and/or directed by a senior manager to whom you have a reporting relationship.

The above indicates the main duties that may be reviewed in the light of experience and developments within the service. Any review will be undertaken in conjunction with the post holder.

PERSON SPECIFICATION

JOB TITLE: Legacy & Grants Fundraising Lead

Note to applicant: When completing your application form you should demonstrate the extent to which you have the necessary education, experience, knowledge and skills identified for the post.

KEY: E = Essential D = Desirable A = Application I = Interview P = Practical S = Short listing criteria		
Requirement	Essential/ Desirable	Assess from:
Education & Qualifications		
Educated to A-level standard or equivalent and a relevant degree to at least one function, or have substantial relevant work experience to a minimum of 3 years	E	A, S
Relevant qualification in fundraising or Trust, Major Donor, or Legacy fundraising	D	A, I
Experience & Knowledge		
Demonstrable success in securing five-six figure sum gifts, in a fundraising capacity.	E	A, I, S
Experience and demonstrable success in Major Donor fundraising, and or Trust fundraising	E	A, I, S
Knowledge of the principles of legacy fundraising and how to implement them	D	A, I,
Experience in monitoring and evaluating projects	E	A, I
Experience of managing a budget and set KPIs	E	A, I, S
Experience in managing data on CRM (Customer Relationship Management) systems and good knowledge of GDPR	E	A, I
An understanding of how income tax, capital gains tax and inheritance tax are calculated and relate to charity legacies	D	A, I,
Experience of working in the charity sector	D	A, I
Significant experience of working with and to a wide range of financial and non-financial KPIs	E	A, I, S
Demonstrable knowledge and understanding of the Trusts market, and or Major Donor Market.	D	A, I
Up-to-date knowledge of best practice within the charity sector generally and particularly changes to communications, legislation, GDPR and codes of practice.	D	A, I
Significant experience of researching, prospecting, identifying and progressing partnership opportunities through to conversion	E	A, I, S
Experience of building effective relationships, influencing and negotiating with key internal and external stakeholders	E	A, I, S
Excellent written and verbal communications skills – with the ability to write for different audiences and purposes and able to influence small and large groups of decision makers through storytelling	E	A, I, S
Networking and strong interpersonal skills – the ability to build good relationships across all levels of the organisation and externally	E	A, I
Personal Attributes		
Committed to equal opportunities, anti-discrimination, anti-oppressive policy and practice and social inclusion	E	A, I, S

Works in an empathetic and sensitive way at all times, particularly when in contact with or distributing information to/on behalf of Hospice families	E	A, I
Committed to the values and work of voluntary and community organisations	E	A, I, S
Able to work as part of a team and on own initiative	E	I
Enthusiastic and self-motivated	E	A, I
Application of creative and lateral thinking, combined with good problem-solving skills	E	A, I, P
Ability to work on a number of competing high priority projects, using different disciplines, at once	E	A, I, P
Ability to work sensitively with people of differing viewpoints	E	I,
Excellent communication skills with an excellent standard of written and oral English	E	I, P
Strong IT, digital and administrative skills	E	I, P
Pro-active and a self-starter	E	I
Ability and willingness to work flexibly including some evening and weekend work	E	I
Able to travel in course of carrying out duties – must hold a driving licence and have access to own vehicle.	E	A, I