

# Legacy Giving Officer

## Job description

Together we are help and hope for everyone living with dementia



# Who we are

**Dementia is the UK's biggest killer. One in three people born in the UK today will develop dementia in their lifetime.**

At Alzheimer's Society, we're the UK's leading dementia charity and the only one to tackle all aspects of dementia by giving help and hope to people living with dementia today and in the future. We give vital support to people facing the most frightening times of their lives, while also funding groundbreaking research and campaigning to make dementia the priority it should be.

**Together with our supporters, we're working towards a world where dementia no longer devastates lives.**

## Our values

**Our values tell everyone who we are as an organisation.**

**Our values make sure that our focus is clear for the challenges and opportunities ahead and remind us of what we all stand for.**

**Our values are evident in everything we do, how we do it and how we work together.**

These are not just words on a wall, we live these every day in all our work. We are determined to make a difference when and where it matters most, by being passionate, focussed and making a lasting impact for people affected by dementia.



### **Determined to make a difference**

We're passionate, we're focused and we make a lasting impact for everyone living with dementia.



### **Trusted expert**

We're listening, we're learning and we use experience and evidence.



### **Better together**

We're open, we combine our strengths and we achieve more together.



### **Compassionate**

We're kind, we're honest and we don't shy away from challenges.

Through our values we will make the greatest difference for people affected by dementia. Whether you are someone living with dementia, a family member or carer, a supporter, a donor, a colleague from another organisation, an employee or a volunteer, these four values will shape your experience with Alzheimer's Society.

# Legacy Giving Officer

## Position in the organisation

Reports to the Regional Legacy Giving Manager

Member of our Legacy team.

Part of our Income and Engagement directorate.

## Purpose of this role

At Alzheimer's Society we are advisors, supporters, fundraisers, researchers, influencers, communicators, technical specialist and so much more. We are volunteers, we are employees, and together we are here to make a difference to the lives of people with dementia and their carers.

The post holder will have overall responsibility for developing and managing all legacy giving activities in their region. The role will represent the Society, raise its profile and promote legacy giving in the region, working collaboratively across departments and directorates at all levels to maximise promotion of legacy giving opportunities both to external audiences and internally within the society.

The post holder will be the lead contact for the warmest legacy enquiries in the region, and through a framework of excellent stewardship, will ensure that supporters are converted up through the legacy cycle.

We are looking for someone who exemplifies our values, someone who is: Determined to make a difference when and where it matters most. A trusted expert who believes in working Better together and demonstrates true Compassion.

## Key accountabilities and responsibilities

- Respond to enquiries from supporters in the region interested in leaving a gift in their Will or wanting to know more about our Will writing offers by phone, email or via in-person meetings in an agreed time frame.
- Responsible for planning, delivering, hosting and presenting at legacy events including post event follow up stewardship activity.
- Responsible for developing and implementing new regional opportunities to promote legacy giving both internally and externally.
- Responsible for meeting agreed annual targets relating to legacy promotion and Will writing promotion and the number of promised legacies from individual supporters.
- Develop and deliver the stewardship plan ensuring ongoing engagement with all legators and enquirers by upgrading and conversion through the legacy cycle: enquirer, considerer, intender, pledger.
- Identify and establish relationships with key Ambassadors who are passionate about legacy giving.

- Maintain accurate donor database records in compliance with Society policy and data protection laws.
- Provide statistical and narrative reports on legacy activity each month and as otherwise required.
- Provide appropriate legacy fundraising awareness training to local staff where this upskilling will lead to supporter referrals for the legacy pipeline.
- Actively build strong internal relationships – including but not limited to services managers, researchers, senior leaders – and work collaboratively with colleagues across other departments and directorates including a network of potential event speakers.
- Build upon good relationships with local solicitors and have a deep understanding of the processes of solicitors who work with our supporters when accessing Will writing services.
- Communicate openly, accurately, and appropriately about the benefits of the different types of bequest and the need for proper legal advice where necessary.
- With the other members of the Regional Legacy Giving team ensure that the promotion and processing of all pledges and gifts are carried out consistently and in keeping with best practice.

## Other tasks

- Works collaboratively with the other members of the High Value and Legacy Team.
- Works closely with the Legacy Marketing Team.
- Works closely with cross-departmental colleagues at all levels across the directorates and Region/Country where this will lead to opportunities to promote gifts in Wills.
- Responsible and accountable for delegated expenditure budget for specific activities (up to £2k).
- Direct supervision of volunteers as required

## We are looking for someone who can...

- Adhere to all the Society's service standards, policies and procedures.
- Comply with the data protection regulations, ensuring that information on clients remains confidential.
- Be responsible for personal learning and development, to support the learning and development of others and the whole organisation.
- Work in a manner that facilitates inclusion, particularly of people with dementia.
- Implement the Society's health and safety policy and procedures, ensuring that all practices and procedures are undertaken in accordance with a healthy and safe working environment and that all staff and volunteers for whom you may be responsible are aware of their responsibilities in respect of their role, monitoring data and recommending action as required.
- Administrate and organise own work to ensure that it is accurate and meets quality targets, reasonable deadlines, and reporting requirements.
- Follow the Society's management information guidelines and requirements, including ensuring appropriate monthly measures on service usage levels are collected and submitted on the services database or other systems in accordance with deadlines.

## Person specification and selection criteria

| Skills & knowledge                                                                                                                                                                    | Application (A) or Interview (I) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Strong customer service skills, proven experience of sales, marketing or fundraising to a wide range of audiences.                                                                    | A/I                              |
| Proven experience of building rapport within a one-to-one relationship with a supporter or customer, discussing technical issues and combining persuasiveness with great sensitivity. | A/I                              |
| Proven track record of exceeding targets.                                                                                                                                             | A/I                              |
| Able to work on own initiative with low level of supervision and set own work priorities.                                                                                             | A/I                              |
| Confident networker and able to build relationships with a wide range of people.                                                                                                      | A/I                              |
| Proven experience of the ability to empathise, appreciate and understand the issues faced by the people you will be communicating with.                                               | A/I                              |
| Enjoys travel and is able to travel independently around the UK including occasional overnight stays as required.                                                                     | A/I                              |
| Confidence with and experience of public speaking or openness to it, on a regular basis both virtually and in person.                                                                 | A/I                              |
| Awareness of legislation applicable to fundraising.                                                                                                                                   | A/I                              |
| Experience of working in a complex, multi-disciplinary organisation within the not-for-profit sector.                                                                                 | A/I                              |
| Experience of using influencing and negotiating skills effectively.                                                                                                                   | A/I                              |

| Competencies & personal attributes                                                                                                  | Application (A) or interview (I) |
|-------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Excellent communication skills (in English), both verbal and written                                                                | A/I                              |
| Ambitious, innovative and incredibly self-motivated                                                                                 | A/I                              |
| Work collaboratively and be able to prioritise your workload effectively and remain solution focussed throughout your areas of work | A/I                              |
| Excellent organisational and timekeeping skills                                                                                     | A/I                              |
| Excellent attention to detail                                                                                                       | A/I                              |

|                                                                                                                 |     |
|-----------------------------------------------------------------------------------------------------------------|-----|
| Be a team player, supporting colleagues when there are deadlines, and who knows when to ask for help themselves | A/I |
|-----------------------------------------------------------------------------------------------------------------|-----|

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# Our benefits



## Financial Security

- Group Personal Pension Plan with Scottish Widows – with up to 8% employer contribution rate
- Life Assurance Scheme – two times your annual salary
- Society Plus and Smart Spending App – giving you unbeatable savings at hundreds of retailers



## Health & Wellbeing

- Health Cash Plan
- 24/7 Employee Assistance Programme including online and face to face counselling
- Discounted gym membership with Society Plus
- Lived Experience Networks
- Mental health app and unlimited therapy



## Personal Development

- Apprenticeships
- Women in Leadership development programme
- Leadership development programme
- Financial support towards relevant professional qualifications



## Family & Dependants

- Enhanced family leave – 16 weeks paid for all parents
- Paid time off work for fertility treatments for both partners
- Paid carers leave
- Paid dependants leave
- Paid compassionate and bereavement leave
- Paid time off work to support those transitioning



## Recognition

- Annual people awards
- Long service awards
- Thank you eCards
- Values Hero and Society Legend Awards



## Work Life Balance

- Annual leave of 27 days increasing to 30, plus bank holidays
- Career breaks of up to 3 months
- Flexible working
- Wellbeing leave