

# Legacy Partnerships 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 Partnerships Officer

## Position in the organisation

Reports to the Regional Legacy Giving Officer  
Member of the 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 Legacy Partnerships Officer will represent Alzheimer's Society, raise its profile, and promote legacy giving to our Will writing partners and legal professionals to secure future income for the charity. They will work collaboratively across the organisation at all levels to maximise our Will writing partnerships.

They will be responsible for the targeted acquisition of new Will writing partners in their regions, whilst delivering a seamless onboarding and retention journey for the professional audience, through outstanding relationship management.

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

- Deliver an effective stewardship and retention programme of support for all Will writing partners by phone, email or via in-person meetings in an agreed time frame.
- Continually monitor and evaluate the performance of our Will writing partners and make recommendations for future development by offering bespoke relationship management through face to face and virtual meetings and training.
- Maintain accurate partner database records in compliance with Society policy and data protection laws.
- Be responsible for planning, delivering and hosting acquisition and retention events for solicitors, including post event follow up stewardship activity.
- Ensure solicitors are paid reimbursement through supporting to set up the partner for payment and through the submission of invoices for payment in a timely manner.
- Be responsible for meeting agreed annual targets through Will writing promotion which will support future Legacy income generation.
- Contribute to the continued development and project management of our Will offers.
- Contribute to our supporter legacy events by inviting partner firms and supporting event hosts on the day.

- Establish and maintain relationships with key partners who are passionate about gifts in Wills and the Society's work.
- Provide statistical and narrative reports on Will writing activity each month and otherwise as required.
- Work closely with the wider Legacy team to maximise opportunities for our supporters and partners, maintain effective communication and co-ordinate initiatives.
- Collaborate with teams across the organisation to identify opportunities and offers that will enhance the partnerships with our Will writing partners.
- Work in collaboration with our Legacy Marketing Team and wider Regional Legacy Team to ensure that our Will offer messaging is supporter led, consistent and on brand.
- Acquire and develop new partnerships through attending networking events and trade conferences and through identifying other opportunities for connection.
- Work closely with teams across the organisation to identify potential new Will writing partners. Collaborate with them on approaching new partners through their work.
- Review our Will writing offer T&Cs to ensure they are relevant for both the organisation and our partners and being upheld by our partners. Make recommendations for review or updates.
- Work collaboratively with the other members of the High Value and Legacy Team.

## **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)
Good customer service skills, proven experience of sales, marketing or business to business partnerships.	A/I
Experience of building rapport within a one-to-one relationship with a customer or business, discussing technical issues and combining persuasiveness with trust building.	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, particularly in a business partnership setting.	A/I
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 possibly 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)
Be a team player, supporting colleagues when there are deadlines, and who knows when to ask for help themselves.	A/I
Be a self-starter and incredibly motivated.	A/I
Excellent organisational and timekeeping skills.	A/I
Excellent attention to detail.	A/I
Non-judgemental communication	A/I
Commitment to and understanding of equal opportunities	A/I
Understanding of the inclusion agenda and its relevance within a diverse society	A/I

# 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