

**Job Description**

**Job Title:** Senior Legacy and In Memory fundraiser (external title Senior Planned Giving Officer)

**Department:** Fundraising

**Location:** Tyrwhitt House, Leatherhead

**Status:** Permanent, full time

**Hours:** 37.5 hours per week, Monday to Friday

**Reports to:** Head of Planned Giving

**Summary of Role**

The Senior Legacy and In Memory Fundraiser will be a key member of the Legacy and In Memory fundraising team with responsibility for helping cultivate, steward and develop donors to pledgers. This includes generating income from legacy and in memory supporters and the management of in memory donations such as MuchLoved, funeral directors and in memory appeals. It includes promoting both these forms of giving.

This post may involve some occasional weekend and evening work, for which time off in lieu will be given.

**Introductory Notes**

This document is a guideline to the general scope of duties involved and may be subject to review at yearly intervals on completion of the charity’s fundraising strategy/business plan.

In addition to amendments requested by the charity, suggested changes to the content of this document which could improve the working situation would be welcome from the post holder.

**Duties and Responsibilities**

**Legacies**

Ensure the best possible communication with all legacy attribute supporters, with messaging personalised to each individual.

Help with organising in the community legacy promotion events around the country.

Help with the regular appeal mailings, working on the messaging for each supporter.

Deliver the existing legacy marketing strategy and work with the Head of Planned Giving to develop this strategy further, and help devise and implement initiatives which continue to maximise legacy awareness, whilst remaining within the agreed promotional expenditure budget.

Help develop analysis of legators for use with any strategy planning.

Attend events to help promote legacy giving.

Help with the stewardship of legacy attribute supporters through regular updates, supporter events etc.

**In Memory**

Help manage the In Memory programme, including MuchLoved, enlisting the support of local funeral directors and promote the campaign appropriately.

Initiate discussions with funeral directors in order to maximise in memory donations.

**Tribute Funds**

Promote tribute funds (MuchLoved) to supporters.

Receipt all donations and provide appropriate acknowledgement and thanks to donors.

Support tribute fund holders and develop a stewardship programme for supporters, specifically from funerals, wakes etc

**Training**

Undertake any necessary training for professional and personal development.

**General Duties**

Work in support of the Head of Planned Giving to ensure the objectives of the fundraising strategy are achieved: regularly communicating and evaluating special areas of responsibility.

Prepare activity reports on a weekly basis.

Liaise with the Head of Planned Giving with regard to day to day issues so ensuring that any necessary action is taken.

Maintain an awareness of the overall activities of Combat Stress and provide informed talks and presentations in the local community as required. This may include evenings and weekends on occasion.

Any other duties which may, from time to time, be required in the interest of the charity.

**Minimum Qualifications/Experience**

Member of the Institute of Legacy Management desirable

Member of Institute of Fundraising desirable

Experience in legacy fundraising desirable

Two years minimum experience in a charity income generation role

Education GCSE grade C or above or equivalent in Maths and English