

JOB DESCRIPTION

Job Title:	Senior Legacy Officer
Responsible To:	Head of Philanthropy
Location:	Home based with requirement for occasional travel
Salary:	£32,359 to £36,698 pro rata (Band D) dependent on experience, plus 8% employer pension contribution.
Duration:	Established post
Hours:	22.2 hours per week (0.6 fte). Flexible working pattern can be agreed.

Job Purpose

Develop, implement and market a legacy giving programme to raise awareness of the importance of legacy income to Butterfly Conservation and secure increased legacy pledges from members, supporters and the general public.

Main Responsibilities

- Develop and organise ongoing promotion of legacy giving throughout all Butterfly Conservation communication channels to increase the numbers of enquiries about leaving a gift in will and legacy pledges.
- To plan and co-ordinate annual events to engage with prospective legacy donors and existing legacy pledgers to raise awareness of the importance of gifts in will and to thank for pledges given.
- Lead on the implementation and promotion of free wills campaigns per year to encourage increased legacy pledges and develop relationships with solicitors to help raise awareness of gifts in will. Look for new avenues to engage with potential donors which may or may not be known to the charity.
- Responsible for producing and distributing direct mail legacy campaigns to existing members and supporters to encourage new enquiries and pledges.
- Responsible for stewardship of legacy pledgers and providing acknowledgements and information to next of kin where appropriate.
- To increase the understanding of the importance of legacies throughout Butterfly Conservation and where possible inspire and engage with staff and volunteers to encourage greater understanding of the importance of this income stream.
- Liaise with the Finance team to advise on all potential legacy income to be received and keep the Finance Team updated on any developments or queries that need to be addressed. Support the Finance Team in contacting solicitors and executors about wills as requested.
- To produce legacy statistics and reports as required.

- Ensure Butterfly Conservation's website is kept updated with current information regarding legacy giving, including review and update Wills Guide.
- Input to the content of the Legacy section of the Fundraising Strategy as required. Ongoing review and evaluation of all activity to make sure that it is being delivered to achieve the objectives in the Fundraising Strategy.

General

- Attend internal meetings as required.
- Promote BC's values (Excellence, Passionate, Inspiring, Collaborative) ensuring they are adopted in all aspects of the role.
- Collaborate effectively with key teams across BC.
- Undertake any other reasonable duties as required and commensurate with the grade of post.
- Undertake all duties and responsibilities in compliance with the rules and regulations encompassing equal opportunities to help foster a diverse and inclusive workforce.
- Work in accordance with BC's policies, procedures, and codes of conduct



PERSON PROFILE

JOB TITLE: Senior Legacy Officer

Technical/Specialist Skills	Essential	Desirable	Method of assessment
Extensive experience of legacy fundraising and marketing	✓		A/I
Experience of working with a voluntary environmental organisation	✓		A/I
Excellent organisational and administrative skills	✓		A/I
Experience of drafting correspondence and publicity materials	✓		A/I
Experience of discussing legacies with members/supporters	✓		A/I
Experience of databases, ideally supporter/ fundraising/ membership	✓		A/I
Experience of segmenting and analysing data	✓		I
The ability to use other IT applications e.g. databases, spreadsheets, word processing	✓		I
Excellent written and oral communication skills for all audiences	✓		I
Experience of event planning and management	✓		A/I
Knowledge of health and safety and risk assessment procedures for activities and events being organised	✓		I
Decision making and society policy			
Empathy with aims and objectives of Butterfly Conservation	✓		A/I
Willing and able to contribute to fundraising aims and objectives	✓		I
Line Management/Contractor Responsibility			
Experience of dealing with suppliers and contractors especially print and design companies	✓		A/I
Working with Volunteers/Managing External Partners and others			
Excellent written and oral communication skills for all audiences	✓		A/I
Excellent customer care skills	✓		I
Experience of working with volunteers and the public	✓		I
Personal Attributes			
Well organised and self-motivated	✓		I
Able to manage a busy and varied work programme	✓		I
Mature and confident approach when dealing with senior supporters at all levels	✓		I
Ability to have sensitive conversations around legacies	✓		I
Able to readily assimilate information and respond to a changing environment	✓		I
Able to solve problems and identify new technology to increase efficiency	✓		I
Able to work effectively as a member of a team	✓		I
Pragmatic, enthusiastic and able to motivate others	✓		I
Willing to work occasional weekends away from home	✓		I
Full driving license (or means to travel).	✓		A

Key: A = Application Form I = Interview