



## Job Description

<b>Post Title</b>	<b>Development Officer (Legacies)</b>
<b>Reporting to</b>	Development Manager (Legacies)
<b>Staff reporting to this post</b>	None
<b>Liaises with</b>	All colleagues in Development, also Marketing & Communications, Engagement, Estates, Lundy, freelancers and suppliers.
<b>Hours</b>	Full time (35hrs/wk) flexible working hours considered
<b>Contract Term</b>	Permanent
<b>Department and Location</b>	Development Office at Shottesbrooke, near Maidenhead Hybrid working options available
<b>Date of document</b>	27 January 2024

We are one of Britain's leading heritage conservation charities. With the help of our supporters, we save historic buildings in danger of being lost forever, restore such 'Landmarks' using skilled craftspeople and their apprentices, and make them available for all to enjoy for holidays. This income supports their ongoing care, whilst free open days and engagement with communities ensure that even more people can learn about and experience these extraordinary places. We have an ambitious pipeline of future heritage rescue projects throughout the UK which will depend on supporters giving donations in their lifetime, and the income we receive from legacies, which is playing an increasing role.

### Role summary and purpose

This is a new role created to support and build upon a successful legacies programme, and to develop the potential of in-memory giving. You will be supporting the Development Manager (Legacies) to deliver the legacy marketing programmes, supporter stewardship, and legacy administration.

The varied scope includes delivering projects and communications to promote gifts in wills and in-memory giving, managing the stewardship of your own portfolio of legacy supporters, and assisting with legacy administration when gifts are received. Whilst reporting to the Development Manager you will also work closely with eight other colleagues in the Development team, and others throughout the organisation. Occasional travel will be also required for site visits, meetings and events to engage supporters face to face with our work throughout the UK.

### Key Duties

Work with and support the Development Manager (Legacies) to:

- Deliver an effective strategy for gifts in wills and in memory.
- Meet an agreed annual pledger recruitment target and other mutually agreed KPIs.
- Acknowledge and celebrate gifts in wills to raise awareness throughout the organisation, with its followers, supporters, visitors, staff and volunteers.
- Gather content from colleagues to produce high quality and inspirational updates for legacy supporters and their families.
- Respond to potential enquiries about all types of legacy gifts and gather details about each.
- Plan and run legacy seminars given by a volunteer solicitor, and an annual in-person event for identified legacy supporters.

## Responsibilities

### Marketing and promotion:

- Gather information from existing content and new sources to draft updates and other stewardship communications for individuals and legacy families.
- Identify case studies and stories from across our work, to show the impact of legacies and gifts in memory.
- Help promote any free wills offer, in collaboration with our communications team.
- Support and champion the promotion of legacy giving through the organisation.

### Supporter stewardship and acknowledgement:

- Use personalised, creative communications to engage and build relationships with legacy supporters e.g. remembering birthdays, upcoming stays in Landmarks, areas of special interest.
- Ensure the Landmark and Lundy Commemorative Books, acknowledging gifts, are periodically updated and explore online options to enhance this offering.
- Assist with any other donor acknowledgements to recognise legacy, and in memory gifts, both online and offline.

### Events

- Plan and deliver legacy recruitment and stewardship events as required by the Development Manager (Legacies), including seminars on gifts in wills delivered by a volunteer solicitor, and an annual in-person stewardship event for identified legacy pledgers.
- Attend other supporter events where guests include existing and potential legacy intenders

### Administration of Estates:

- Work in conjunction with the Development Manager (Legacies) to support the Legacy Consultant in maximising the charity's entitlement to the deceased's Estate.
- With support from the Data and Supporter Services Officer ensure both gifts in wills and in memory income is recorded appropriately.

### Database, reporting and evaluation:

- Work with the Data and Supporter Services Officer, the Finance Team and Legacy Consultant to ensure accurate financial reporting and reconciliation for audit purposes.
- Maintain contact records within the Salesforce CRM database, and the gifts in wills/in memory record database.
- Assist with analysis of legacy and in memory income trends and use data and other insights to support legacy reporting, marketing, prospects, and segmentation.

### Compliance

- Ensure that the work with individuals and legacy Administration is compliant with all legal and regulatory requirements (including data compliance and regulation).
- Keep up to date with any changes and operate in line with the codes of practice, sector best practice and industry standards.

### Financial

- Contribute to the setting of budgets (income targets and expenditure).
- To manage the safe and proper handling of, and accounting for, income arising from your areas of responsibility.
- Monitor and manage all income and operating costs within given budgets and areas of responsibility. Liaise with Finance to ensure information is supplied to meet deadlines.

- Continually strive to improve margins, reduce costs and wastage as well as suggesting improvements in operating processes at a specific and more general level.

#### General

- To support the Development Director in fundraising planning and strategy.
- To take personal responsibility for all the administration and database requirements arising from the post holder's role, ensuring accurate and up to date records are maintained.
- Comply with the Fundraising Code of Practice, UK GDPR, PECR and any other legal obligations.
- To appreciate, and work within, the organisation's culture and to conduct all activities in a manner which promotes and enhances the Landmark Trust's character and reputation.
- To undertake any other duties as may be reasonably required in the post.

This is an outline job description that may be subject to change in consultation with the post-holder.

## PERSON SPECIFICATION

Category	Essential	Desirable
<b>Education and Qualifications</b>	A' Levels or equivalent qualifications.	Evidence of CPD in fundraising, and/or Chartered Institute of Fundraising courses & qualifications.
<b>Experience</b>	Excellent customer/donor care experience with a proven track record of exceptional listening skills.	Previous fundraising experience or particular experience of gifts in wills or gifts in memory.
	Examples of writing marketing or fundraising reports and proposals, updates etc.	Previous Marketing or Direct Marketing experience
	Experience of working to agreed targets, managing multiple tasks and meeting deadlines.	
<b>Competencies &amp; skills</b>	Ability to communicate with different audiences, both verbally and via written communications.	
	Exceptional active listening and observation skills with excellent recollection and recognition abilities.	
	Ability to build empathy and pay attention to non-verbal clues and actions.	
	Methodical and organised approach to tasks with meticulous attention to detail. Ability to plan and prioritise.	Experience or knowledge of Estate Administration.
	Self-motivated with the ability to progress several tasks simultaneously and maintain time scales, including when working under pressure.	
	Able to create inspiring case studies and other donor communications to a high standard, often to tight deadlines.	
	IT literate. Proficient in MS Office suite (Word, Excel, PowerPoint, SharePoint, MS Teams) and Outlook email.	
	Experience of fundraising CRM databases.	Salesforce database experience
	Ability to problem-solve, think creatively and arrive at solutions.	
<b>Other Requirements</b>	Positive, can-do attitude with a proactive and flexible approach.	Knowledge or interest in heritage, and/or the natural environment.
	Empathy with and commitment to the work of the Landmark Trust.	
	Able to work alone and as part of a team.	
	Comfortable with change and with a willingness to learn.	
	Able to attend events, occasionally on evenings and weekends with overnight stays.	Full driving licence and confident using it.

## **WORKING AT LANDMARK**

Newcomers say we're a friendly bunch who work hard. We are a flat, agile organisation, proud and passionate about the work we do.

Our benefits package includes hybrid and flexible working options and following probation, enhanced sick and holiday pay and pension and life assurance. There's also a relaxed dress code, staff welfare support through our Employee Assistance Program, a training and development scheme and opportunities to take part in our property review scheme.

### **CONTRACT DURATION**

This is a full-time permanent contract.

### **LOCATION**

Our offices are based on the Shottesbrooke Park estate in the village of White Waltham near Maidenhead. Within the leafy surroundings are a 14th-century church, lake, walking paths and lots of wildlife. Converted stables and a farmhouse form the office base for the director and functional teams. We often meet for lunch around the kitchen table and go for walks in our breaks.

### **SALARY**

Circa £30,000 per annum depending on skills and competencies, paid monthly in arrears.

### **WORKING HOURS**

35 hours a week.

### **HOLIDAYS**

The holiday entitlement is 25 days per annum plus statutory holidays.

### **SICK PAY**

During the probationary period you will only be paid your Statutory Sick Pay entitlement. After this period, you will receive full basic pay during any sickness absence up to 20 days in any 12-month period. The Statutory Sick Pay will be included in this sick pay. Where absence exceeds seven consecutive calendar days and in certain other circumstances, a doctor's certificate will be required.

### **PENSION SCHEME**

You will be automatically enrolled in Landmark's pension scheme.

### **MEDICAL HEALTH**

Private health insurance, currently with BUPA, will be provided when you have been with Landmark for a year. Landmark's contribution will be pro-rated for part-time employees.

### **NOTICE**

The appointment is subject to satisfactory completion of an initial 6-month probationary period, though this may be extended if more time is needed to assess suitability for employment. During this period the post will be subject to one week's notice on either side. A minimum of three months' notice in writing on either side applies after the end of the probationary period.

### **HEALTH & SAFETY**

All staff are expected to observe all health and safety at work regulations as set out by Landmark in accordance with statutory requirements.

**CONTRACT**

The successful applicant will be required to sign Landmark's Contract of Employment.

The purpose of this information is solely to help prospective employees to understand the details of Landmark's Conditions of Employment. It is not an offer of employment and does not form part of the Contract of Employment or the Job Description.