

Community Legacy Manager

Job Band	Level 4	Reference	#11117
Department	Marketing & Mass Fundraising	Division	Marketing, Fundraising & Communications
Reporting To	Senior Community Legacy Manager	Location	North of England
Hours	35 per week	Duration	Permanent
Last Updated	January 2025		

Scale and scope of role

Direct reports	0	Indirect reports	0
Budgetary responsibility / accountability	Expenditure budget c£25K	Accountability for other resources	
Reach and impact	<p>To be the lead person in the North of England responsible for legacies which are a vital source of income for the British Red Cross and the single largest net voluntary income stream.</p> <p>Responsible for managing legacy fundraising and relationship development in the area through bespoke legacy events and effective stewardship.</p> <p>Collaborate with other Red Cross departments, retail division and across the charity and will writing sectors to ensure effective communications about the importance of legacies to the Red Cross.</p>		

Context

The British Red Cross (BRC) helps people in crisis, whoever and wherever they are. We are part of a global voluntary network, responding to conflicts, natural disasters and individual emergencies.

We enable vulnerable people in the UK and abroad to prepare for and withstand emergencies in their own communities. And when the crisis is over, we help them to recover and move on with their lives. Our success in making a difference to the communities in which we operate is dependent upon sufficient legacy income generation (currently £41M) to support and pay for our service delivery, both nationally and internationally.

Scope

Legacies are a vital source of income for the British Red Cross and the single largest net voluntary income stream. The post holder will be the main point of contact for all legacy relationships within their area. They will engage the public, supporters, staff and volunteers about the importance of gifts in wills to the British Red Cross and how they are the gifts that are never forgotten. They will achieve this through excellent stewardship and creating experiences, bringing the Red Cross closer to their communities.

Our values and principles

Our values (compassionate, courageous, inclusive and dynamic) underpin everything we do. As a member of the Red Cross and Red Crescent Movement, the British Red Cross is committed to, and bound by, its fundamental principles: humanity, impartiality, neutrality, independence, voluntary service, unity and universality.

Diversity

At the British Red Cross, we are looking for the right people to help us provide support to millions of people affected by crisis in the UK. We want our team to reflect the diversity of the communities we serve, offering equal opportunities to everyone, regardless of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, or sexual orientation.

Diversity is something we celebrate, and we want you to be able to bring your authentic self to the Red Cross. We want you to feel that you are in an inclusive environment, and a great position to help us spread the power of kindness.

Purpose of Post

To increase the number and value of legacies left to the British Red Cross by increasing the number of those interested in leaving a legacy, converting those intending to do so, and retaining those who have already done so.

Main Duties & Responsibilities

1. To plan, budget, lead and manage all aspects of legacy relationship fundraising within the North of England.
2. To support the Senior Community Legacy Manager and the Head of Legacies in the development of a fully effective legacy fundraising strategy.
3. To develop relationships with legacy prospects, both those generated by marketing activity and through community legacy promotion, to achieve a high conversion rate of prospects to pledgers. This will include phone, email and letter communication combined with face-to-face, project visits and events.
4. To manage a stewardship programme for legacy pledgers within their areas that will confirm their legacy intentions and offer them further opportunities to become more closely involved with the British Red Cross, with the aim of retaining their legacy gift and potentially increasing its value.
5. To collaborate with the Senior Community Legacy Manager, the Head of Legacies, volunteering, regional fundraising, retail and service teams to broaden access and spread awareness to volunteers and other Red Cross audiences to highlight the importance of legacies.
6. To manage legacy experiences using the legacy event best practice guide as a benchmark, promoting legacy giving to selected audiences. This will include all aspects of event management such as sourcing venues, invitations, content, organising equipment and catering, giving presentations, sourcing guest presenters and developing and managing ongoing relationships with attendees. When appropriate, consider and organise virtual events for supporters.
7. To establish and manage relationships with regulated will-writing professionals within their areas such as solicitors and work with them to promote BRC legacy giving and initiatives such as Will Aid and National Free Wills Network.

8. To take the lead in raising internal awareness of legacy giving in their areas and empowering British Red Cross colleagues to participate in legacy promotion. This will involve working closely with the community legacy team, regional fundraising managers, service managers and the marketing and fundraising team.
9. To manage and work within the post holder's expenditure budget reporting back to the Senior Community Legacy Manager monthly. This will include providing comprehensive monthly reporting across the area on all activity and regularly updating the current database - Ascent.
10. To undertake any other reasonable duties as requested by the Senior Community Legacy Manager.
11. To attend team meetings, events and training courses which will at times require overnight stays.
12. To contribute to legacy initiatives as requested by the Senior Community Legacy Manager or the Head of Legacies.
13. To uphold the Fundamental Principles of the International Red Cross and Red Crescent Movement and to work within the BRC's equal opportunities and health and safety policies.

Person Specification

	** = minimum short-listing criteria * = desirable
Education/ Training	No formal training, good command of the English language and good numeracy skills
Experience	<ul style="list-style-type: none"> * Experience in fundraising or sales development and the third sector **Experience of events and project management **Experience of public speaking and giving presentations **Experience of preparing and monitoring plans and budgets **Experience of cross-team working **Experience of customer service or stewardship
Knowledge/ Technical Skills	<ul style="list-style-type: none"> ** Strong IT and database skills ** High degree of literacy/numeracy *A knowledge of legacy fundraising techniques would be an advantage
Personal Skills	<ul style="list-style-type: none"> **Ability to work independently, proactively and with minimal supervision ** Ability to deliver engaging, informative and effective presentations ** Diplomacy, sensitivity, empathy and maturity when engaging with supporters about legacies which can be a very personal subject **Ability to work effectively with colleagues across various locations and develop excellent working relationships with staff, volunteers and supporters *Ability to adopt a strategic approach to solving problems and tackling challenges **Excellent time-management skills **Ability to work accurately, paying close attention to detail * Strong negotiating and influencing skills

	<p>** Ability to work calmly under pressure</p> <p>** Flexibility and ability to prioritise workloads to achieve deadlines</p>
Special Circumstances	<p>** Able to travel around the region and stay overnight where appropriate</p> <p>** Hold a full driving licence and able to use their own car for work-related travel (mileage will be reimbursed and use of hire cars is encouraged for longer journeys)</p> <p>Understanding of and commitment to equal opportunities policy and to the Fundamental Principles of the Red Cross</p>

All disabled candidates who meet these criteria will be short-listed for interview, in line with our commitment to the “two tick” scheme.