

JOB DESCRIPTION

JOB DETAILS	
Job Title	Senior Individual Giving and Legacy Officer
Reports to	Head of Charity
Band	Band 6
Department/Directorate	Corporate Services/Fundraising

JOB PURPOSE
<p>The Senior Individual Giving and Legacy Officer will play a key role in the development and delivery of the charity's Individual Giving and Legacy and In Memory fundraising activity, working collaboratively with the Charity Leadership Team to shape and implement a sustainable approach to individual supporter income.</p> <p>The postholder will lead on the operational design and delivery of Individual Giving, In-Memory and Legacy activity, translating agreed priorities into high-quality campaigns, stewardship activity and supporter communications. The role will focus on growing income, building long-term supporter relationships and establishing robust systems and processes to support future growth.</p> <p>This is a senior specialist role with a strong delivery focus. The postholder will not have line management responsibility but will provide expertise, guidance and leadership within their income streams.</p>

KEY RESULT AREAS/PRINCIPAL DUTIES AND RESPONSIBILITIES
<ul style="list-style-type: none"> To lead the operational delivery of Individual Giving activity, including campaigns, regular giving, in-memory donations and one-off gifts, in line with agreed priorities and targets. To work collaboratively with the Charity Leadership Team to help shape, develop and implement an effective Individual Giving and Legacy approach. To lead the delivery and development of the charity's Legacy and In-Memory Giving activity, supporting both immediate income and long-term pipeline growth. To manage a caseload of pecuniary, residuary and life interest trust legacies, liaising professionally with solicitors, executors and families, safeguarding the charity's interests at all times. To design, deliver and evaluate high-quality fundraising campaigns and supporter communications, working closely with marketing and communications colleagues across appropriate channels. To ensure excellent standards of supporter care and stewardship, including sensitive acknowledgement, recognition and feedback on the impact of donations. To use CRM systems, data and insight to monitor performance, inform decision-making, improve supporter retention and maximise lifetime value. To monitor income and activity against agreed targets, identifying risks, opportunities and areas for improvement and escalating issues appropriately. To ensure all Individual Giving and Legacy activity complies with relevant legislation, regulation, codes of practice and internal policies and procedures.

- To act as a professional ambassador for the charity, building effective internal and external relationships and using strong interpersonal and negotiation skills to work sensitively with clinical and ward teams to ensure legacy and in-memory gifts are managed in the best interests of patients, families and the Royal Devon Hospitals Charity.

KEY WORKING RELATIONSHIPS

Areas of Responsibility: Operational delivery of Individual Giving, In-Memory and Legacy fundraising activity.

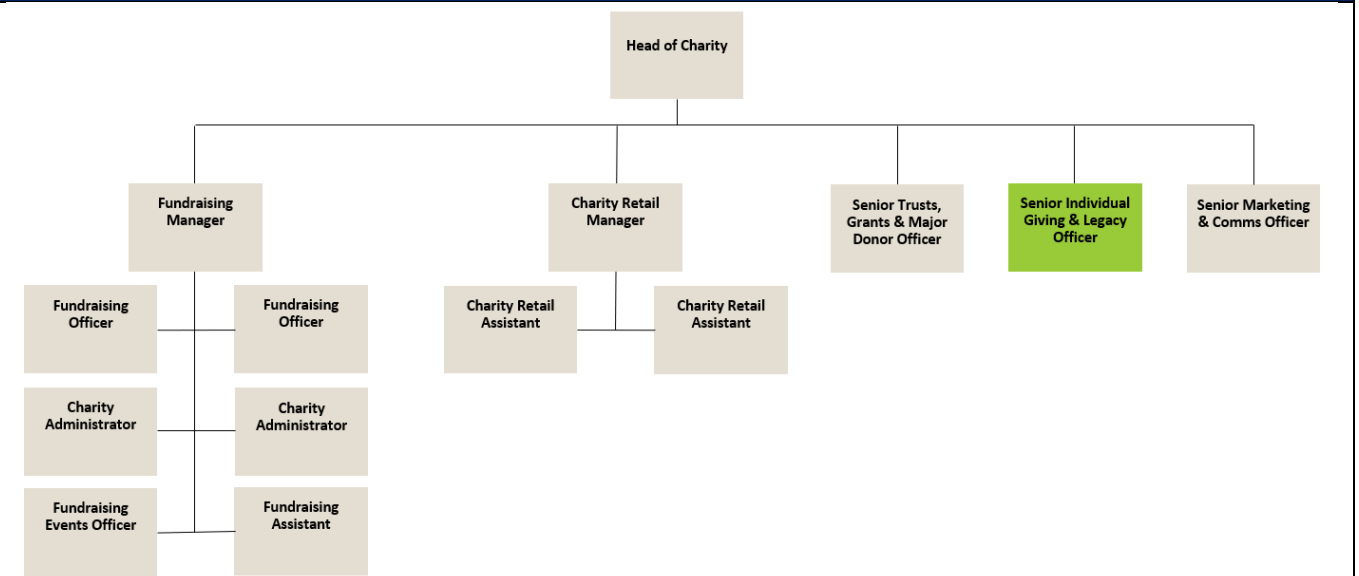
The post holder is required to deal effectively with staff of all levels throughout the Trust as and when they encounter them on a day-to-day basis.

In addition, the post holder will deal with the wider healthcare community, external organisations and the public. This will include verbal, written and electronic media.

Of particular importance are working relationships with:

Internal to the Trust	External to the Trust
<ul style="list-style-type: none"> Fundraising and Marketing teams Head of Charity and Senior Leadership Team Corporate Trustees and Non-Executive Directors Clinical, operational and care group leads Finance and Communications teams 	<ul style="list-style-type: none"> Association of NHS Charities Donors, supporters and bereaved families Solicitors, executors and professional advisers External suppliers and sector partners

ORGANISATIONAL CHART



FREEDOM TO ACT

The postholder will work with a high degree of autonomy within agreed objectives, broad occupational policies and procedures, with senior colleagues available for reference where required.

- Plans and delivers Individual Giving and Legacy activity independently within agreed priorities and budgets.

- Agrees and applies appropriate approaches in consultation with senior colleagues to achieve outcomes, including campaign design, stewardship activity and workload prioritisation.
- Exercises professional judgement in managing sensitive supporter and legacy matters.
- Escalates strategic decisions, significant risks or variances in performance to relevant leadership within the Trust and Charity.

COMMUNICATION/RELATIONSHIP SKILLS

The role requires complex, sensitive and persuasive communication on a frequent basis.

- Regularly communicates with donors, bereaved families, solicitors, clinicians and senior stakeholders.
- Builds constructive relationships with clinical and ward teams, using strong interpersonal, influencing and negotiation skills to manage sensitive discussions relating to legacy and in-memory giving.
- Explains complex or sensitive information clearly and compassionately, particularly in relation to legacy and in-memory giving.
- Builds trust-based relationships and influences stakeholders.
- Represents the charity professionally, maintaining discretion, confidentiality and reputational awareness at all times.

ANALYTICAL/JUDGEMENTAL SKILLS

The postholder is required to analyse complex information and exercise professional judgement frequently.

- Analyses complex income, supporter behaviour and campaign performance across Individual Giving, In-Memory and Legacy activity, including legacy pipeline and case progression, using CRM data and insight.
- Compares options and recommends practical solutions to improve performance and supporter experience.
- Balances income generation objectives with sensitive supporter engagement and ethical considerations.
- Identifies risks and opportunities and determines appropriate action within agreed frameworks.

PLANNING/ORGANISATIONAL SKILLS

The role involves planning and organising a broad range of complex activities and workstreams, adjusting plans and strategies in response to changing circumstances and performance information.

- Plans and manages complex Individual Giving and Legacy programmes, campaigns, supporter journeys and stewardship activity, adjusting strategies where targets or circumstances change. Balances short-term income delivery with longer-term pipeline and stewardship activity.
- Coordinates activity with fundraising, communications and finance colleagues.
- Adapts plans in response to performance data, changing priorities or operational constraints.

PATIENT/CLIENT CARE

The postholder will have occasional direct contact with patients, relatives and carers who wish to make a donation or discuss fundraising support, including in-memory or legacy giving.

- Engages sensitively, empathetically and professionally with patients and families, including those affected by serious illness or bereavement.
- Provides clear information about ways to support the charity, responding appropriately to questions and emotional cues.
- Maintains clear professional boundaries and knows when to signpost individuals to clinical staff or other support services.

POLICY/SERVICE DEVELOPMENT

The postholder contributes to service improvement within defined frameworks and leads service development within Individual Giving and Legacy fundraising.

- Implements established fundraising, finance and Trust policies and procedures within own area of responsibility.
- Proactively identifies, proposes and leads improvements to Individual Giving and Legacy processes and supporter journeys.
- Contributes to the development and implementation of agreed changes that may impact beyond their immediate area of responsibility.

FINANCIAL/PHYSICAL RESOURCES

The postholder manages Individual Giving and Legacy resources within defined limits and agreed budgets. The role has delegated authority to order goods and services and to approve campaign and application expenditure within agreed financial limits. Overall budget ownership and sign-off remain with the Head of Charity.

- Ensures accurate processing, recording and reporting of Individual Giving and Legacy income.
- Manages delegated campaign expenditure in line with procedures and value-for-money principles.
- Ensures appropriate use and care of fundraising materials and resources.

HUMAN RESOURCES

The postholder has no line management responsibility.

- Provides expert advice, guidance and informal support to colleagues and volunteers as required.
- Contributes to effective teamwork and knowledge sharing.
- Uphold the Trust Values by demonstrating them in your day-to-day work.

INFORMATION RESOURCES

- The postholder has a regular requirement to develop and produce reports and documentation and to maintain one or more information systems. Maintains accurate supporter records using CRM systems.
- Regularly develops and produces reports and documentation using a range of IT applications, including CRM systems and spreadsheets, and maintains project and supporter pipeline information systems to support performance monitoring and decision-making.
- Ensures compliance with GDPR and information governance requirements.

RESEARCH AND DEVELOPMENT

The postholder undertakes ongoing professional development as required for their role.

- Keeps up to date with Individual Giving and Legacy fundraising best practice and regulation, through regular engagement with sector guidance, networks and professional development activity.
- Applies learning and sector insight to improve fundraising activity and supporter experience.

PHYSICAL SKILLS

- The postholder will require well-developed IT and keyboard skills for prolonged use of CRM systems, databases and digital communication tools.
- Occasional physical skills are required to support fundraising activity, including setting up and dismantling displays, handling fundraising materials and equipment, and supporting event activity where appropriate.
- Manual handling will be undertaken in line with Trust policies and training.

PHYSICAL EFFORT

- Combination of sitting, standing and walking throughout the working day. Light physical effort required

MENTAL EFFORT

- Frequent requirement for prolonged concentration, particularly when managing complex legacy cases, analysing data or producing reports.
- Work pattern may be predictable or unpredictable, with regular interruptions requiring prioritisation and re-prioritisation of tasks to meet deadlines. Absorb and retain large quantities of diverse information and make connections.
- Participate in a wide range of meetings.

EMOTIONAL EFFORT

- Rare exposure to distressing or emotional circumstances, for example when discussing sensitive subject matter relating to illness, bereavement or donor motivations.

WORKING CONDITIONS

- Hybrid working model, with a combination of office-based, site-based and remote working.
- Predominantly office-based working conditions when on site, with the use of display screen equipment for a significant proportion of the working day.
- Regular movement between Trust sites and occasional attendance at community or fundraising events.
- Occasional requirement to work evenings or weekends to support fundraising campaigns or events, with time off in lieu in accordance with Trust policy.
- Regular travel between Trust sites and to external meetings as required by the role.

OTHER RESPONSIBILITIES

Take part in regular performance appraisal.

Undertake any training required to maintain competency, including mandatory training, e.g. Manual Handling

Contribute to and work within a safe working environment

You are expected to comply with Trust Infection Control Policies and conduct him/herself at all times in such a manner as to minimise the risk of healthcare-associated infection

As an employee of the Trust, it is a contractual duty that you abide by any relevant code of professional conduct and/or practice applicable to you. A breach of this requirement may result in action being taken against you (in accordance with the Trust's disciplinary policy) up to and including dismissal.

You must also take responsibility for your workplace health and wellbeing:

- When required, gain support from Occupational Health, Human Resources or other sources.
- Familiarise yourself with the health and wellbeing support available from policies and/or Occupational Health.
- Follow the Trust's health and wellbeing vision of healthy body, healthy mind, healthy you.
- Undertake a Display Screen Equipment assessment (DSE) if appropriate to role.

GENERAL

This is a description of the job as it is now. We periodically examine employees' job descriptions and update them to ensure that they reflect the job as it is then being performed, or to incorporate any changes being proposed. This procedure is conducted by the manager in consultation with the jobholder. You will, therefore, be expected to participate fully in such discussions. We aim to reach agreement on reasonable changes, but if agreement is not possible, we reserve the right to insist on changes to your job description after consultation with you.

Everyone within the Trust has a responsibility for, and is committed to, safeguarding and promoting the welfare of vulnerable adults, children and young people and for ensuring that they are protected from harm, ensuring that the Trusts Child Protection and Safeguarding Adult policies and procedures are promoted and adhered to by all members of staff.

At the Royal Devon, we are committed to reducing our carbon emissions and minimising the impact of healthcare on the environment, as outlined in our Green Plan available on our website. We actively promote sustainable practices and encourage colleagues to explore and implement greener ways of working within their roles.

PERSON SPECIFICATION

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Requirements	Essential	Desirable
<p>QUALIFICATION/ SPECIAL TRAINING</p> <ul style="list-style-type: none"> • Educated to postgraduate diploma level or equivalent level of relevant experience. • Fundraising qualification or working towards a relevant professional qualification • Membership of the Chartered Institute of Fundraising and/or Institute of Legacy Management 	E	D
<p>KNOWLEDGE/SKILLS</p> <ul style="list-style-type: none"> • Strong knowledge of Individual Giving and/or Legacy fundraising within a charity environment • Understanding of Gifts in Wills, In-Memory giving and sensitive supporter engagement • Knowledge of fundraising regulation and best practice, including the Fundraising Regulator Code of Practice and GDPR • Ability to use fundraising CRM systems to record activity, analyse data and produce reports • Ability to interpret income and performance data to inform decision-making and improvement • Excellent written and verbal communication skills, with the ability to tailor messages for different audiences • Ability to work sensitively, ethically and professionally with patients, families and bereaved supporters • Knowledge of NHS or healthcare charity fundraising environments • Understanding of legacy administration processes, including working with solicitors and executors 	E	D
<p>EXPERIENCE</p> <ul style="list-style-type: none"> • Significant experience working in fundraising or a related income generation role • Experience delivering Individual Giving activity such as appeals, campaigns, regular giving or donor stewardship • Experience contributing to or delivering Legacy and/or In-Memory fundraising activity • Experience creating donor communications, appeals or supporter materials 	E	

<ul style="list-style-type: none"> • Experience working collaboratively with colleagues across different functions • Experience managing multiple projects, campaigns or workstreams simultaneously • Experience managing a caseload of legacies • Experience working with bereaved supporters or within sensitive environments 	E	D D D
<p>PERSONAL ATTRIBUTES</p> <ul style="list-style-type: none"> • Ability to work independently using initiative, while contributing effectively as part of a team • Strong organisational skills with the ability to prioritise workload and meet deadlines • High levels of professionalism, discretion and integrity • Empathy and emotional resilience when dealing with sensitive situations • Commitment to continuous professional development • Strong alignment with Trust and charity values 	E E E E E	
<p>OTHER REQUIREMENTS</p> <ul style="list-style-type: none"> • The post holder must demonstrate a positive commitment to uphold diversity and equality policies approved by the Trust. • Ability to work flexibly, including occasional evenings or weekends • Ability to travel between Trust sites and attend meetings or events as required • Full UK driving licence, access to a vehicle for business use and appropriate business insurance. 	E E E E	

		FREQUENCY			
		(Rare/ Occasional/ Moderate/ Frequent)			
WORKING CONDITIONS/HAZARDS		R	O	M	F
Hazards/ Risks requiring Immunisation Screening					
Laboratory specimens	N				
Contact with patients	Y	X			
Exposure Prone Procedures	N				
Blood/body fluids	N				
Laboratory specimens	N				
Hazard/Risks requiring Respiratory Health Surveillance					
Solvents (e.g. toluene, xylene, white spirit, acetone, formaldehyde and ethyl acetate)	N				
Respiratory sensitisers (e.g isocyanates)	N				
Chlorine based cleaning solutions (e.g. Chlorclean, Actichlor, Tristel)	N				
Animals	N				
Cytotoxic drugs	N				
Risks requiring Other Health Surveillance					
Radiation (>6mSv)	N				
Laser (Class 3R, 3B, 4)	N				
Dusty environment (>4mg/m3)	N				
Noise (over 80dBA)	N				
Hand held vibration tools (=>2.5 m/s2)	N				
Other General Hazards/ Risks					
VDU use (> 1 hour daily)	Y				X
Heavy manual handling (>10kg)	Y	X			
Driving	Y			X	
Food handling	Y	X			
Night working	N				
Electrical work	N				
Physical Effort	Y		X		
Mental Effort	Y			X	
Emotional Effort	Y			X	
Working in isolation	Y			X	
Challenging behaviour	Y	X			