

Job Description – Legacy & In-Memory Manager

Job Title:	Legacy & In-Memory Manager
Reports to:	Head of Partnerships and Philanthropy
Location:	Scottish SPCA HQ in Dunfermline and/or remote working as agreed
Hours:	35 hours per week, Monday to Friday
Salary:	£33,651 - £36,508 per annum (BP7)

About the Scottish SPCA

The Scottish SPCA is Scotland's animal welfare for charity. For over 180 years we have been on hand to protect animals and prevent cruelty. Over almost two centuries we've grown to become a national charity which celebrates the strength of the human-animal bond and enriches the lives of animals and people.

We champion animal welfare through our education programmes encouraging respect and kindness and supporting our mission to eradicate animal cruelty. We care for, rescue, rehabilitate, release and rehome thousands of animals each year.

Overall Purpose of the Role

Legacies make up circa 42% of the Scottish SPCA's income. This role is an exciting opportunity for a creative, driven, passionate and meticulous individual to support, steward and grow our pool of legacy donors ensuring the Scottish SPCA can respond to the changing needs of animals and their owners over the next decade.

This role will

- champion and celebrate legacies and in-memory giving – internally and externally – raising awareness of the importance of legacies to our work and celebrating milestones met as a result of these gifts.
- develop new products to engage supporters and increase the number of supporters who include a gift in their will or give a gift in-memory of a loved one or loved animal to the Scottish SPCA.

Key Responsibilities:

Leadership & Strategy

- The Legacy & In-Memory Manager will be responsible for developing, implementing and driving forward an exciting new strategy to engage more supporters, and give them, and loved ones, an amazing supporter experience.
- Contribute, and share expertise, to shape the wider fundraising strategy and organisational strategy where appropriate.

- Provide advice, recommendations and assistance to the Senior Leadership Team on the management, administration and use of legacy income by the Scottish SPCA.
- Build relationships with all colleagues to ensure they understand the importance of legacy and in-memory income to the Scottish SPCA and equip and motivate them to promote legacies and in-memory giving regularly, and with confidence.
- Raise the profile of legacy and in-memory giving nationally and highlight its impact on the work of the Scottish SPCA.

Legacy Fundraising

- Discuss the value and potential of legacies left to Scottish SPCA with existing and potential new supporters on a one-to-one basis – on the telephone, email or face-to-face meeting, with a view to converting interest into firm legacy pledges
- Achieve agreed income targets for your income stream including additional KPIs such as number of new legacy pledges and enquiries.
- Develop and re-fresh the in-memory proposition at the Scottish SPCA enabling people to give on-line and in person at local centres in-memory of a loved one or loved companion animal.
- Work with colleagues to create and deliver inspiring campaigns for new and existing supporters engaging them in legacy and in-memory fundraising
- Promote a range of free Will writing offers as appropriate to supporters, staff and volunteers, with the aim of generating legacy pledges following up unrealised enquiries and generating future income.
- Plan and organise a series of Legacy Marketing in-person and virtually, annually, generating opportunities for new legacy enquiries and pledges and following up on these.
- Support with community talks where audiences fit a legacy profile.
- Working with our Marketing & Communications team build a strong bank of case studies and potential speakers for legacy events and marketing campaigns.
- Engage key solicitor contacts, keeping them informed and supplied with up-to-date Scottish SPCA legacy information, visiting firm's offices and liaising with fee earners.

Stewardship & Administration

- Develop Legacy Supporter Journeys with the Supporter Experience Manager
- Establish nurturing compassionate relationships with executors and next of kin ensuring the reputation of the Scottish SPCA is upheld and communicating and celebrating the impact of a loved one's gift where appropriate.
- Work with colleagues in Finance and Supporter Experience to ensure a documented end to end process for the administration of legacies income and pledges, including proper accounting, and where appropriate, restricting of legacies income, ensuring legacy activities are in compliance with any key legal and statutory requirements.



- Working with our Finance team closely monitor legacy case files ensuring maximum value of funds in line with legator's wishes and moving these to completion as quickly as possible.
- Liaise with co-beneficiary charities building effective relationships to ensure the proper and timely receipt of funds.
- Work with our Finance team, and our solicitors (where appropriate) on the administration of complex cases including scrutiny of sales of properties and investments ensuring funds are maximised in line with the legator's wishes.

Personal specification:

	Essential	Desirable
Education & qualifications	<ul style="list-style-type: none"> • Significant experience of administering legacies • Experience of using a fundraising database to record legacies and in-memory income • Experience of speaking with bereaved supporters and demonstrating compassion and sensitivity • Experience of meeting or exceeding targets and KPIs • Experience in organising and delivering successful events 	<ul style="list-style-type: none"> • Institute of Legacies Management Qualification or Paralegal qualification • Experience of developing and delivering legacy marketing messages including campaigns
Experience & job knowledge.	<ul style="list-style-type: none"> • An excellent understanding of the legalities of the fundraising sector, particularly those that are relevant to Legacy fundraising, along with a grasp on the wider landscape of the sector. • A commitment, and passion for animal welfare 	<ul style="list-style-type: none"> • Understanding probate law as it applies in Scotland
Job related skills / competencies	<ul style="list-style-type: none"> • Demonstrable ability to establish and maintain effective relationships with executors, supporters and stakeholders • Ability to work independently and to manage time effectively • Willingness to base decisions on insight and engage a diverse range of potential supporters with the Scottish SPCA 	
Personal attributes	<ul style="list-style-type: none"> • Willingness and ability to travel throughout Scotland and to work evenings and weekends on occasion 	
Additional relevant criteria	<ul style="list-style-type: none"> • Full drivers licence 	