

Job Description

Job Title:	Legacy Fundraising Coordinator	Department:	Fundraising
Reports to:	Supporter Care Manager	Salary:	Band 3 (£16,055 - £20,615 per annum according to skills and experience.)
Accountable to:	Supporter Care Manager	Hours:	37.5 hours per week. Monday - Friday 9am - 5pm
Responsible for:		Location:	Cedars site, Compton, Wolverhampton

Main Purpose of Job

To grow legacy income by delivering effective legacy marketing campaigns which aim to increase the number of pledges and gifts in wills left to us by supporters. To provide a gold standard supporter experience and effectively administrate gifts in wills left to Compton Care.

Main Responsibilities and Tasks

Legacy Marketing

- To deliver the legacy marketing strategy in order to meet legacy income targets by promoting Compton Care's need for this vital income stream.
- To create and implement legacy marketing campaigns which aim to secure pledges from supporters through a variety of channels such as digital, direct mail, events, advertising and printed materials.
- To use appropriate data from the database and segment it in order to reach target audiences for legacy messages.
- To collaborate with other fundraising team members to deliver and grow key legacy fundraising initiatives such as Make a Will Month.
- In agreement with line manager, create legacy marketing materials with support from the PR and Marketing team and as part of this gather legacy case studies which aim to inspire and motivate others to leave a gift in their will.
- Engage with target audiences effectively using sector best practice, innovative and appropriate marketing approaches. Research and test approaches ensuring they are sensitive yet effective.
- Seek to engage with industry professionals such as solicitors, estate and wealth management services etc in order to market Compton Care's need for legacies.

Legacy Administration

- Manage a caseload including pecuniary and residuary legacies
- Ensure that Compton Care receives its full entitlement in accordance with the law and the provisions of the Will/Codicil(s), any Deed of Variation or settlement agreement
- Ensure that all incoming correspondence is dealt with in a timely manner
- Respond to incoming enquiries by letter, telephone and email, ensuring the appropriate legacy case files are updated accordingly
- Liaise with other charities where necessary and act as lead charity as appropriate
- Record and update all relevant information regarding a legacy on the charity's database, Donorflex.
- Ensure all open legacy case files are reviewed on a regular basis and appropriate action taken to move cases through to conclusion.
- Scrutinise estate accounts and ensure that an estate has been administered correctly to

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include the allocation of capital gains tax and inheritance tax.

- Ensure legacies are allocated in restricted and unrestricted funds, in accordance with the Will
- Represent and protect the interests of Compton Care in all correspondence and to deal appropriately with legal professionals and members of the public and answer all queries as required
- Ability to manage volunteers as and when required by the role.

Budgeting, Reporting and Compliance

- Ensure effective reporting on the Legacy pipeline and relationships is given to the Supporter Care Manager
- Ensure effective recording and use of supporter information and our database systems in line with departmental procedures.

Supporter Management

- Act as first point of contact for all Legacy Giving enquiries, notifications and pledges.
- Work with supporters and solicitors to deliver a gold standard experience and a clear communication plan for each pledge.
- Work with departmental colleagues and all other departments to ensure that each supporter pledge and any restrictions within the pledge are properly managed and adhered to.
- Inspire and motivate supporters and solicitors through regular communication, presentations and direct contact with the Compton Care
- Work collaboratively with other income generation teams to ensure supporter communications are planned and managed and do not conflict with other campaigns.

Brand development and reputation

- Ensure adherence to and promote our brand and reputation.
- Ensure all legacy marketing material meets Compton Care's values and is sensitive to our audiences.

When required this role will also assist with reception duties at The Cedars providing high standards of customer service to visitors and ensuring their enquiries are answered and they are directed to the right department.

To undertake reasonable tasks and activities as required by the line manager.

To give support, as agreed by line manager, to other income generation departments if resource and capacity allows.

Other

Governance and Risk

- Ensure that all staff for which the post holder has responsibility to participate in the development and implementation of clinical governance.
- Promote and facilitate the development of clinical audit and the management of clinical risk including patients' impact wherever possible and appropriate.
- Responsible for ensuring that effective monitoring systems are in place to include areas such as recruitment, appraisal, CPD, clinical supervision, performance management and registration verification.
- Investigate and implement lessons learned with regard to all complaints / incidents within section, ensuring that those are shared across the directorate as appropriate.

Smoking

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- Compton acknowledges its responsibility to provide a safe, smoke free environment, for its employees, service users and visitors. Smoking is therefore not permitted except in designated areas and in accordance with the guidelines set down within the No Smoking Policy.

Information Governance

- Compton Care requires its staff to comply with Information Governance related standards and policies at all times when dealing with confidential information, which includes any information relating to the business of the organisation and its service users and employees.
- All Compton Care employees are bound by a duty of confidentiality and must conduct their duties in line with the organisations Confidentiality Code of Practice, General Data Protection Regulation (2016/679 EU) (GDPR), will come into effect on 25 May 2018 throughout the EU and will replace the Data Protection Directive (95/46/EC), which is implemented in the UK through the Data Protection Act 1998.
- New governing legislation for collecting and processing personal data in the EU and Freedom of information Act which all employees must adhere to as this a binding legislative act from the European Union for the protection of personal data.
- Post-holders must maintain high standards of quality in corporate and clinical record keeping ensuring information is always recorded accurately and kept up to date. The post-holder must only access information, whether paper, electronic or in other media, which is authorised to them as part of their duties.
- All Information obtained or held during the post-holder's period of employment that relates to the business of the organisation and its service users and employees will remain the property of the Compton Care. Information may be subject to disclosure under legislation at the Organisation discretion and in line with national rules on exemption.
- Any breach of confidentiality or computer misuse could lead to disciplinary action, and in serious cases could result in dismissal. Breaches after the post-holder's employment has ended could result in the organisation taking legal action against them.
- Post-holders must ensure that they are aware of their responsibilities by attending the Compton Care Mandatory Training and Induction programmes.
- Your obligations of confidentiality shall not prevent you from raising genuine concerns about healthcare, or a belief that criminal conduct, breach of a legal obligation, health and safety breaches or damage to the environment has been, is being, or is likely to be committed, or any information tending to show any of the above has been, is being, or is likely to be, deliberately concealed.
- This is provided that any such disclosure is made in good faith and in accordance with the provisions of the Public Interest Disclosure Act 1998 and the Compton's Whistle Blowing Policy.

Corporate communication to support the charity

- Compton may require employees to support the organisations charitable activities.
- All charitable activities are managed by the Marketing and Fundraising departments, and there may be times when the organisation will require employees to participate in promotional or publicity activities.

Customer Care - Our Mission will be a leader defining palliative care excellence in the UK

- The aim of the organisation is to provide patients and other service users with the best possible care and service, therefore all our staff are required at all times to put patient and our service user first and to do their utmost to meet their requests and needs courteously and efficiently. All staff to abide by Compton Care Values:
 - Excellence and Innovation
 - Respect and accountability
 - Community and partnership
 - Passion and determination

Compassion and empathy

Equality and Diversity

- Compton's committed to promoting equal opportunities to achieve equity of access, experience and outcomes, and recognising and valuing people's differences. All employees have an obligation to help achieve this through personal example, open commitment and clear action.
- Each individual will take responsibility for promoting inclusive and accessible service provision, employee development and a culture that values and respects difference.
- All employees should be familiar with and actively promote and work within Equality and Diversity policies at all times ensuring that they do not unlawfully discriminate, either directly or indirectly, on the grounds of race or ethnicity, nationality, religion or belief, sex, marital or civil partnership status, sexual orientation, disability, gender reassignment, age, pregnancy/maternity or any other grounds.
- We take our legal and moral obligations with respect to equal opportunities seriously and welcome dialogue with groups and individuals on ways in which our equal opportunities policies and practice can be enhanced.

Health and Safety

- As an employee you have a responsibility to abide by all of the safety practices and codes provided by Compton Care and have an equal responsibility with management for maintaining safe working practices for the health and safety of yourself and others.
- All employees must comply with the Compton Care Health & Safety Policy. All employees must attend Health & Safety training as required within their department or as directed by their line manager.
- All employees must adhere to their duties under the Health and Safety at Work Act 1974 and other associated safety legislation. In addition, employees must comply with Compton's policies relating to Health & Safety and Risk Management to secure a safe workplace and will draw management's attention to any deficiencies and/or hazards, which might prove detrimental to themselves or others.

Risk Management:

- All staff have a responsibility to report all clinical and non-clinical accidents or incidents promptly and, when requested, to co-operate with any investigation undertaken.

Infection Control

- Staff will work to minimise any risk to clients, the public and other staff from Healthcare Associated Infection including MRSA and C difficile by ensuring they are compliant with the Health Act 2006 - Code of Practice For The Prevention and Control of Healthcare Associated Infections (They Hygiene Code); and by ensuring they are familiar with the Compton Care Infection Control Policies, located on the Intranet.
- All employees must comply with the Compton Care Infection Control Policy. All employees must attend infection control training as required within their department or as directed by their line manager.
- Compton is committed to reducing the risk of health care acquired infections. Accordingly it is essential that employees adhere to all infection control policies, procedures and protocols (to include hand decontamination, correct use of PPE (Personal Protective Equipment) and care and management of patients with communicable infections). Employees should participate in infection prevention initiatives and challenge infection prevention practices, reporting breaches using Compton's incident reporting system.

Job Design and Review

- This job description may be subject to change in the future. Any proposed changes will normally be discussed fully with the post holder and confirmed with an updated job description.

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Patient Experience and Public Involvement (PEPI)

- Compton is committed to gaining feedback from all those that use services provided by Compton through a variety of methods.
- Feedback is used to ensure that future services meet the needs of the patients and demonstrate continuous improvement.

Policies and Procedures Safeguarding

- All employees have a responsibility to support the safety and well-being of children, young people and adults at risk of harm and to practice in accordance with legislation.
- Knowledge, skills and competency are to be maintained according to role and responsibilities in order to fulfil safeguarding children and adults at risk responsibilities.
- All employees are expected to comply with existing local Safeguarding policies and procedures, and Compton and Wolverhampton Safeguarding Children Board and Safeguarding Adults at Risk requirements.

Disclosure and Barring Service

- There are some roles within the organisation that require enhanced DBS screening in order to be able to start work within the Organisation.
- Where relevant to the role employees will be required to undertake this screening as part of the recruitment process and this will be updated on a regular basis whilst in employment.

Statutory and Mandatory Training

- All employees are required to complete any statutory or mandatory training as required by Compton or statutory auditing and regulatory bodies.
- Employees also required to refresh training as required and undertake any additional training as part of being employed by the organisation.

Use of Information Technology

- All employees are required to undertake duties and development related to computerised information management to meet the changing needs and priorities of Compton, as determined by your manager and in accordance with the grade of the post.

Person Specification

Requirements	Essential	Desirable
Education and Qualifications	Minimum of 5 GCSEs (including Maths and English) or equivalent.	
Experience, knowledge and skills	<ul style="list-style-type: none">• Relevant fundraising/commercial experience.• Experience of Legacy administration• Experience of delivering an income and expenditure target	<ul style="list-style-type: none">• Previous use of Donorflex database• Knowledge of legacy giving sector practices and initiatives.

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	<ul style="list-style-type: none"> • Experience of promoting fundraising campaigns, events or products. • Excellent presentation skills to all ranges and sizes of audiences • Persuasive and adaptable written and oral communication skills • Knowledge of fundraising databases or commercial equivalent • IT literate with good experience of MS Office and database systems as appropriate for the role 	
<p>Personal skills and attributes</p>	<ul style="list-style-type: none"> • Highly motivated with ability to work to targets • People focused with excellent interpersonal skills. • Ability to empathise and be sensitive in difficult circumstances • Exemplary communication and organisational skills • Able to manage a complex and demanding workload • Good numeracy skills • Creative and innovative • Attention to detail • Willingness to learn and use initiative • Enthusiastic and positive attitude • Passionate about the work of Compton Care • A team player 	