Philanthropy Officer (Legacies)

Department: Office of Philanthropic Partnerships and Alumni [OPPA]

Hours of work: Full-time | 37 hours a week (Open for discussion on part-time working)

Contract type: Open

Salary: Grade 5 | £27,131 - £33,314 a year | reduced pro-rata for part time working
Introduction:

Founded on principles of excellence, equality and opportunity for all, the University of York opened in 1963 with just 230 students. In 2022 it is the home of more than 20,000 students across more than 30 academic departments and research centres.

York wasn’t an identikit University in the 1960s, so it shouldn’t be now. Our new University Strategy 2030 is to be a University for Public Good, and is focused around four key aims that blur the lines between research, teaching, support and community aspirations. This new vision, combined with the success of York Unlimited (the campaign for York), have raised the bar for philanthropic fundraising and alumni engagement activity at the University of York. Our mission over the next 10 years is to increase the value of philanthropic income, enabling us to deliver activities that make us a University for Public Good.

The part you will play

You will work alongside the Legacy and In-Memory Giving Manager and be responsible for raising philanthropic funding from donations given and pledged by individuals as a gift to York in their Will. These gifts make a significant contribution to the wider Individual Philanthropy Team’s annual income and pledge targets.

In this varied role you will work closely with all members of OPPA, and colleagues across the University, as well as the University’s community of alumni, staff, retired staff and friends, to increase the profile of giving a gift to York in a Will.

We are seeking a highly motivated individual who can bring innovative ideas for legacy acquisition campaigns and donor stewardship. If you have skills in relationship management, event-planning and communications, and are passionate about philanthropy in Higher Education, then we would really like to hear from you.

Main purpose of the role

The role of Philanthropy Officer (Legacies) is to increase the number of legacy pledges to the University of York, and inspire and encourage existing donors to continue their support for the University and increase their legacy gifts.

The role will lead on producing and running a programme of digital and off-line communications for potential legacy donors. You will share inspirational stories and act as a champion for gifts in Wills for both internal and external parties.

The role will develop and implement the events and stewardship programme for the Heslington Circle (people who have pledged a gift in their will to York). In addition, the role will support the administration and stewardship of legacy gifts.
This role is advertised as full time, 37 hours per week but we also welcome applications from anyone interested and has a preference for part-time.

**Key responsibilities**

(Role holders will be required to undertake some or all of the duties below)

1. **Role Specific Responsibilities**
   A. Managing a personal portfolio of legacy prospects and donors:
      - Follow up on leads of potential legacy donors, from amongst the University’s community of alumni, staff, retired staff, and friends. You will use your communication skills, passion and enthusiasm to explain how remembering York in their will can change lives and leave a lasting legacy. You will work to targets based on the number of annual meetings, pipe-line progression, and pledges made.
      - Implement a stewardship programme for Heslington Circle members: including organising events to engage and thank donors on the impact of legacy giving to the University, as well as create communications and use storytelling to show the future impact of their legacy gifts to the University.
      - Accurately record information and communications, enquiries, research, gifts and pledges in a timely fashion on RE/NXT database.
   B. Run the legacy communication programme:
      - Work with colleagues in the Fundraising Programme Team to produce a programme of communications to raise the profile of legacy giving, including direct marketing, telethon, events, and other communications to increase the number of potential legacy supporters and steward existing donors.
      - Forge excellent relationships across all areas of the Office of Philanthropic Partnerships and Alumni to identify cross divisional communication opportunities for legacy messaging, where appropriate.
   C. Support the administration of legacy gifts:
      - To provide efficient, effective and proactive administration to legacies bequeathed to the University, working with solicitors and executors of estates and the families to ensure legacy gifts are designated and used in accordance with donor wishes.
      - Work with colleagues across the University, including Academic Departments, Colleges, Finance and senior leadership to maximise the impact and recognition of legacy gifts to the University, ensuring appropriate plans are in place for the disbursement of funds and stewardship plans are in place for the donor’s next of kin.
   D. Be a champion for legacy fundraising and gifts in wills:
      - Be a champion for legacy fundraising and Gifts in Wills by keeping up to date with current legislation and best practice in the HE and Charity sector.
      - Use this knowledge to support other teams within OPPA.

2. **University of York Responsibilities for Grade 5**

**Service and Operational Delivery**
- Undertake day to day decision making for operational aspects of service or delivery, within a
designated area of responsibility.

- Deliver services to standards set by others, using initiative and independent action to meet service needs.
- Manage the resolution of escalated issues or queries where the answer requires consideration and application of judgement.
- Where appropriate, solicit customer views on the nature and quality of the service provided.
- Make effective use of digital solutions to carry out operational activity and implement efficiency improvements.
- Act as a supportive and encouraging member of a team. For roles at this level with supervisory responsibilities, demonstrate compassion and give advice on commonly occurring wellbeing issues.

Continuous Improvement

- Monitor and review service or operational delivery in conjunction with line manager, recommending / implementing improvements to process, service or governance.
- Contribute to and/or initiate the development and improvement of methods of service delivery.
- Research, analyse and interpret data/findings, using standard methodologies to identify opportunities for improvement. Where appropriate, independently identify and source additional information for consideration.
- Proactively identify opportunities for building new personal knowledge and skills for self and others.

Specialist Contribution

- Provide detailed advice to internal and external stakeholders on service-specific policies, procedures and regulations.
- Carry out investigations, searches and research information and data to identify trends and patterns.
- Analyse data and statistics and provide reports for higher level decision makers.
- Provide expertise to support compliance with legislation and statutory duties.

Collaboration and Communication

- Establish, maintain and develop productive and ongoing relationships with colleagues across the University, to support service delivery and issue resolution.
- Contribute to business meetings, working groups and committees to enable efficient service delivery and manage stakeholder expectations.
- Engage with external peers and specialists to exchange knowledge and information.
- Use a range of digital media and tools to communicate with a diverse range of key stakeholders.
- Collaborate with team members to identify and implement service improvements or alterations.

Governance and Oversight

- Implement and monitor recognised procedures to ensure compliance.
- Provide training to team members on procedure e.g. data handling and recording.
- Ensure accuracy by implementing recognised and routine checks, assessment criteria and techniques.

Planning and Organisation

- Plan and organise your own workload (and, where applicable, the workload of team members) to manage short term fluctuations and changing priorities.
- Contribute to longer term plans/programmes of work.
- Plan and organise small scale projects.
Person specification

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<th>Role Specific</th>
<th>Essential / Desirable</th>
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<tr>
<td>Experience of working in a fundraising, sales or marketing department</td>
<td>Essential</td>
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<td>Experience of legacy fundraising for a higher education institution or charitable organisation</td>
<td>Desirable</td>
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<td>Flexibility with respect to variable working hours, including availability to travel throughout the UK and perhaps internationally by private and public transport</td>
<td>Essential</td>
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<td>Passion to engage and inspire donors, share stories and explain the difference their gift will make. Enthusiasm for a fundraising role.</td>
<td>Essential</td>
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<td>Excellent interpersonal skills, including tact and sensitivity to work with donors who’ve made legacy pledges and families of those who have made a bequest. An ability to deal with confidential matters and act with discretion.</td>
<td>Essential</td>
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<td>Excellent oral and written communication skills, with the ability to provide specialist and detailed advice and guidance coherently.</td>
<td>Essential</td>
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<td>Knowledge of the processes involved in legacy administration, including basic knowledge of the legal steps and procedures involved in estate administration / a keen interest in learning and training in post.</td>
<td>Desirable</td>
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<td>Motivated by the potential to develop a successful career in University fundraising</td>
<td>Desirable</td>
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<td>Knowledge of Raisers Edge / NXT or similar relationship management database</td>
<td>Desirable</td>
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**Qualifications:**

Level 3 qualification. (Qualifications at this level include A levels. Please [view the full list](link). We also welcome applicants with equivalent non-uk qualifications or equivalent professional experience.

**Skills - demonstrates the ability to:**

Manage small-scale projects

Gather, analyse, interpret and report data/information

Use digital technologies including Google applications and/or Microsoft Office

Communicate effectively in verbal and written formats, including the use of a variety of digital tools

**Behaviours:**
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<td>Works collaboratively with others</td>
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<td>Delivers a quality service</td>
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<td>Develops self and others</td>
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<td>Actively champions respect, inclusivity, equality and diversity</td>
<td>Essential</td>
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<td>Identifies and implements continuous improvement</td>
<td>Essential</td>
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