

Legacy Officer Job Description

Job Location:	Head Office, Edinburgh EH12 5EZ
Responsible to:	Head of Donor Care & Legacies
Responsible for:	N/A

1. Introduction to Chest Heart & Stroke Scotland

NO LIFE HALF LIVED

Everyone has the right to live life to the full. After a diagnosis of a chest or heart condition or a stroke, many people experience fear and isolation and struggle with the impact on their lives. Chest Heart & Stroke Scotland won't stand for that. The care and support we deliver every day ensures everyone can live the life they want to.



Our Vision: welcome to a Scotland where people with our conditions can live their lives well. Full lives, with the right support, at the right time and in the right place. A place where you can shape your future and live the life you want to lead.

Our Mission: welcome to a community where people can support each other, secure the expert help they need and collectively advocate for the care that matters to them. Welcome to the charity that never underestimates the power of a cup of tea, a conversation started, a recovery begun.



No Life Half Lived means we need to listen to people with our conditions and deliver well for them. We have identified four goals to get us there.

We will place our focus on **addressing the unmet needs** of people with our conditions - social, emotional, and physical - across all Scotland's communities.

We will be **led by our people:** people with lived experience of our conditions, their families & carers, friends, colleagues and healthcare professionals.

We will secure the **funding required to deliver via a diverse income portfolio that is consistent with our values** and ethical approach.

We will be **effective and accountable** in all that we do.

We have developed six values to guide us in delivering against our goals:

Agile: we will be able to adapt to the needs of our people and the environment we work in.

Innovative: we will look for improvement in what we currently do and be creative in developing new services.

Inclusive: we will adopt a human rights based approach to our work and ensure we are accessible.

Accountable: we will take ownership for our work and hold decision makers to their responsibilities.

Collective: we can only achieve our goals by working together and learning from each other.

Courageous: we will say what needs to be said and do what needs to be done to meet our goals.



2. Job Purpose

This new part-time role sits within the Donor Care & Legacies team. Legacies are a core income stream at CHSS, accounting for roughly 40% of the Charity's voluntary income each year. The Legacy Officer will be the first point of contact for legal professionals and personal executors in the administration of Wills.

3. Key Challenges

- Working with external stakeholders to ensure a high level of customer service is received and maintained and CHSS's aims and objectives are met.
- To make financial decisions - in conjunction with the Head of Finance and Head of Donor Care & Legacies, regarding property and shares and collaborate on end of year audit work.

4. Key Responsibilities

Primary:

- To maintain and regularly update the Legacy Access database with all correspondence, biographical and financial detail and to oversee the eventual transition onto Raisers Edge.
- To build robust and long term working relationships with solicitors and suppliers.
- To monitor and reconcile legacy notifications from all sources; eg: Smee and Ford, solicitors, white mail etc.
- To be responsible – once agreed with Head of Finance and Head of Donor Care & Legacies – for signing off legacy accounts related to each Estate.
- To provide written reports and liaise with the Head of Donor Care as necessary on legacies status and pipeline.
- Building and maintaining an in-depth knowledge of CHSS legacies and the legacy pipeline.
- Keeping up to date with news and trends relating to legacy administration.

- Carrying out evaluations of work/progress on a regular basis.
- Dealing with enquiries and escalating issues in an appropriate manner.

Secondary:

- To support the Head of Donor Care & Legacies with legacy promotion (materials, advertising etc) as required.
- To scope out, plan and organise new CHSS Will Clinics in conjunction with McClure Solicitors in 2017.
- To scope out, plan and coordinate the first CHSS legacy event/s for supporters longer term.

5. Key Results/Objectives

To maintain a minimum level of legacy income for CHSS each year by building robust and long term working relationships with solicitors and regularly updating the databases – so that historical data is accurate and pipeline of legacy income is clear.

6. Dimensions

Budget responsibility: None

Contacts:	Internal	Fundraising Colleagues Finance Department Office & Facilities Team Colleagues across CHSS
	External	Solicitors, Executors

The above job description is not exhaustive and is clarified to include broad duties inherent in the post. Evaluation and development of this post may, in time, indicate a need to revise duties herein.

Person Specification

	Essential	Desirable
Education and Knowledge	<ul style="list-style-type: none"> • Good educational standard with a minimum of Higher English or equivalent 	
Previous Experience	<ul style="list-style-type: none"> • Customer/Donor Care Experience 	<ul style="list-style-type: none"> • Experience of legacy administration (within the legal or charity sectors) • Experience of dealing with solicitors • Experience of legacy marketing and/or legacy events • Working knowledge of Raisers Edge Database
Skills Aptitudes Abilities	<ul style="list-style-type: none"> • Ability to use own initiative • Ability to manage time effectively • Work with minimal supervision but part of a team • Proficient in all Office 2010 applications • Excellent inter-personal and communication skills • Ability to focus on work tasks in an open plan environment • Ability to communicate with a variety of audiences – eg; solicitors, legacy pledgers, other charities etc. 	<ul style="list-style-type: none"> • Knowledge of regulations related to legacy fundraising e'g, data protection, tax etc. • Understanding/knowledge of the General Data Protection Regulations
Disposition	<ul style="list-style-type: none"> • Commitment to ethos of the voluntary sector • Commitment to equal opportunities 	

Summary of Terms and Conditions of Employment

Term:	Permanent
Salary:	Grade 5, Scale Points 15-23, £18,443 - £22,426 pro rata <i>New appointments are normally placed at the base of the salary scale unless there are exceptional circumstances.</i>
Hours of work:	20 hours per week (CHSS full-time is 32.5 hrs)
Review of Work:	The post-holder is subject to the CHSS objective setting, supervision and appraisal process.
Annual Leave:	CHSS leave year runs from 1st April to 31st March. Employees are entitled to 36 days annual leave in their first year of service (including public holidays). An employee will be awarded one extra day's annual leave for each complete year of service up to a maximum of 42 days (including public holidays). These allowances are pro-rated for part time employees and further pro-rated for those who join or leave CHSS during the leave year.
Pension scheme:	<p>CHSS offers a Group Personal Pension Plan, which has been established with Aviva. The Plan is a money purchase arrangement. You can choose at what rate you wish to contribute (subject to a minimum age related contribution) and how to invest your own contributions and those made by CHSS. The emerging fund at the point that you wish to take the benefits is then used to purchase a pension that is paid for the rest of your life.</p> <p>Employee's and Employer's Contributions are paid on the portion of the employee's salary which is above the National Insurance contributions threshold (the Lower Earnings Limit). Employees who meet the relevant criteria are "automatically enrolled" in the scheme.</p> <p>There are also schemes which provide death-in-service benefit and permanent health insurance.</p>
Equal Opportunities:	CHSS is committed to equality of opportunity and to no discrimination on the grounds of race, religion or belief, age, sex, marital or civil partnership status, disability, sexual orientation, transgender status, pregnancy or maternity.