

## JOB DESCRIPTION

<b>Job Title:</b> DEVELOPMENT OFFICER (LEGACIES)	<b>Accountable to:</b> Director of Development	
<b>Contract Length:</b> Permanent	<b>Hours per week/FTE:</b> FTE	<b>Weeks per year:</b> FTE
<b>Salary:</b> £33,653 - £41,329	<b>Grade:</b> 4	
<b>College/Service:</b> Operations & External Affairs	<b>Location:</b> High Holborn	

### Purpose of Role:

The Development Officer (Legacies) is responsible for developing relationships with existing and potential legacy pledgers and dealing efficiently with all aspects of legacy and in memoriam giving. They represent UAL in a professional and sensitive manner, building strong relationships with alumni and others to encourage legacy giving in support of the university's ambitious future plans and the support of our students.

Working closely with colleagues in the Development department, the Development Officer (Legacies) is responsible for maximising the income UAL receives from giving in wills and in memory of our supporters. As part of the implementation of the UAL Development Strategy 2016-2022, the Development Officer (Legacies) will work with the Director of Development, Head of Campaigns, Head of Major Giving and others to develop a legacy promotion campaign in support of a comprehensive UAL fundraising campaign and specific capital and other campaigns.

*Recruitment of the Development Officer (Legacies) is part of the largest-ever investment in UAL's fundraising capacity with seven new posts added to the Development department during 2017 and 2018. This investment reflects the enormous potential for fundraising at UAL, including plans for significant capital projects in a number of colleges, and a first-ever comprehensive fundraising campaign.*

## Duties and Responsibilities

### Legacy fundraising and relationship-building

- To administer all legacies and in memoriam gifts received by UAL and to ensure appropriate acknowledgments and other forms of recognition are fulfilled as per the wishes of the legator or other donor.
- To map and record all existing legacy pledges we are aware of across UAL, including working with colleges, academics and alumni relations colleagues to identify pledges and potential pledgers of which we do not currently have a central record.
- To develop strong relationships with existing and potential legacy pledgers.
- To be the first point of contact when people enquire about leaving a legacy to UAL and to respond promptly.
- To offer basic advice to those who have pledged or are considering pledging to UAL while respecting the limits of advice that can be offered without independent legal advice to the individual concerned.
- To maximise the income received from legacies and in memory of people, always dealing with these gifts in a sensitive and respectful manner.
- On receipt of notification of a legacy, liaise with executors and/or solicitors efficiently and in order to ensure that UAL receives the legacy as quickly as possible.
- Record all in memoriam gifts and thank donors and family members as appropriate.

### Marketing

- To work with the Director of Development and other relevant staff to develop appropriate strategies for promotion of legacy giving, especially in support of a comprehensive UAL fundraising campaign and specific capital and other campaigns.
- To develop and revise legacy promotion materials, including documents which can supplement wider fundraising campaigns.
- To co-ordinate correspondence and appropriate invites to legacy pledgers and families from relevant UAL colleagues.
- To acknowledge legacies in the Annual Review or other appropriate materials.
- To consider other legacy promotion vehicles such as participation in a free will scheme or similar, and to make recommendations to the Director of Development.

**Administration and other duties**

- To keep accurate, up-to-date files of all legacies received and legacy pledges and review regularly.
- To maintain records of all those who have enquired about legacies.
- To work with solicitors who are acting on behalf of clients, where appropriate.
- To have a general understanding of the legal process and responsibilities associated with receiving legacy donations and to be able to speak to potential legators with knowledge.
- To be able to speak to potential legators about the roles of executors and the probate process.
- To understand the possibility of contention in wills and probate and respond appropriately.
- To work closely with the rest of the Development department, and other relevant teams such as Partnerships, Finance and Legal, in handling relationships with legators and potential legators.
- To keep an up-to-date record of all legacy income and expenditure.

**Other duties**

- To perform such duties consistent with your role as may from time to time be assigned to you anywhere within the University
- To undertake health and safety duties and responsibilities appropriate to the role
- To work in accordance with the University's Equal Opportunities Policy and the Staff Charter, promoting equality and diversity in your work
- To undertake continuous personal and professional development, and to support it for any staff you manage through effective use of the University's Planning, Review and Appraisal scheme and staff development opportunities
- To make full use of all information and communication technologies in adherence to data protection policies to meet the requirements of the role and to promote organisational effectiveness
- To conduct all financial matters associated with the role in accordance with the University's policies and procedures, as laid down in the Financial Regulations

**Key Working Relationships:** Managers and other staff, and external partners, suppliers etc; with whom regular contact is required.

- Director of Development
- Head of Major Gifts, Head of Campaigns, Head of Trust and Foundations and Trusts and Foundations Manager, Head of Development Services
- Development Managers
- Development Officer (Major Gifts and Trusts and Foundations)
- Alumni Relations Manager
- College staff, especially those dealing with alumni
- Finance
- Legal

**Specific Management Responsibilities**

**Budgets:** TBD

**Staff:** None

**Other** (e.g. accommodation; equipment): None

Signed \_\_\_\_\_ Date of last review \_\_\_\_\_  
(Recruiting Manager)

**Job Title: Development Officer (Legacies)**

**Grade: 4**

**Person Specification**

Specialist Knowledge/ Qualifications	<ul style="list-style-type: none"><li>- A' Levels, equivalent qualification or suitable professional experience</li><li>- Knowledge of legacy fundraising in the education, arts, cultural or wider charitable sectors, and of the legal responsibilities associated with receiving legacy donations</li></ul>
Relevant Experience	<ul style="list-style-type: none"><li>- Experience of legacy fundraising in the education, arts, cultural or wider charitable sectors</li><li>- A demonstrable understanding of the creative arts and creative industries</li><li>- Experience of working with, and managing a portfolio of, legators, prospective legators, family members, executors and solicitors</li><li>- Experience of promoting legacy giving through appropriate but persuasive methods</li><li>- Strong organisational capabilities</li><li>- Experienced user of Raiser's Edge or similar database</li></ul>
Communication Skills	<ul style="list-style-type: none"><li>- Excellent written and verbal communication skills</li><li>- Ability to adapt style and message to diverse audiences, including to communicate with sensitivity and discretion</li><li>- Ability to build strong relationships with a wide range of people</li></ul>
Planning and Managing Resources	Plans, prioritises and organises work to achieve objectives on time
Teamwork	Works collaboratively in a team and, where appropriate, across or with different professional groups

Customer Service	Provides a positive and responsive experience to legators and potential legators considering making a legacy to UAL
Creativity, Innovation and Problem Solving	Uses initiative or creativity to resolve problems

The application form sets out a number of competence questions related to some of the following selection criteria. Shortlisting will be based on your responses to these questions. Please make sure you provide evidence to demonstrate clearly how you meet these criteria.

**Last updated: May 2018**