

Job title: Senior Legacies Marketing Executive	Responsible to: Director of Fundraising	
Location: Portsmouth, UK	Contract: Permanent	Hours of Work: 35 hours per week, Monday to Friday

About the Royal Navy & Royal Marines Charity

RNRMC is the Navy's principal charity which exists to support every sailor, marine and their families, for life. We do this by offering grants and working with other organisations to deliver programmes that meet the needs of our beneficiaries. We work hard, engaging with supporters to help raise awareness and funds to deliver the outcomes required for today and tomorrow.

Role

We need a dedicated Senior Legacies Marketing Executive to implement and further develop the 5-year legacy plan and strategy. To lead and deliver all Legacy marketing communications (including direct mail, email, social media advertising, promotion, events and engagement). Respond positively and efficiently to all UK legacy queries from supporters and the public and to provide support to other local markets with the handling of legacy enquiries from their supporters.

Job Summary

Based within the Fundraising team, this role will be directly responsible for growing and developing our legacy and in memory programme to enable us to meet our ambitious targets and grow this important income stream.

The role will take the lead in developing and implementing acquisition and retention strategies, including audience communication plans and digital marketing activity. You will be responsible for building new cases for support for our appeals and project managing campaigns running across online and offline channels. You will cultivate and manage relationships, and work collaboratively with the team to identify and steward prospects.

The role holder must have at least 2 years' experience of working in a similar Legacy role and / or legal probate role, with a good degree of competence obtained from putting knowledge into practice. A real team player able to deliver projects on time, be reliable and proactive.

Responsibilities and Duties:

Legacy Fundraising

- To implement and further develop the 5-year legacy plan and strategies.
- To create a test-and-learn strategy to improve and fine-tune results from legacy campaigns and supporter journeys.
- Increase the number of legacy pledgers by delivering a range of legacy marketing campaigns and supporter journeys to acquire and convert prospects.
- To develop and implement supporter journeys in conjunction with our Supporter Relations Teams.
- Collaborate with the wider fundraising team and Development Manager (Individual Giving) to identify relevant cross-sell offers and maximise the lifetime value of legacy pledgers.
- Collaborate with the Engagement Team in developing marketing collateral and presentations for legacy hotspot events.
- Work with the Communications Team to develop workshops and training courses for staff and volunteers.

- To test and roll out supporter care journeys for InMem donors and Next-of-Kin contacts where appropriate, complying with GDPR.
- Detail-oriented, you will look after a varied case load of legacy gifts with sensitivity, whilst ensuring the wishes of our supporters are fulfilled and that the value of each gift is maximised where possible.
- Develop strong working relationships with key internal and external stakeholders including solicitors, personal executors, other charities and RNRMC's Finance and Operations Teams;
- Represent RNRMC's interests when the estate is shared with charity co-beneficiaries, seeking to reduce costs, reach best outcomes collaboratively and act as lead charity where appropriate;
- Be responsible for approving final estate accounts, ensuring that Inheritance Tax and Capital Gains Tax is correctly managed and calculated;
- Be responsible for the accuracy of legacy on our CRM database (Raisers Edge), ensuring that all relevant information relating to your cases is entered and updated with precision to enable the effective planning of RNRMC's work.

Financial management and reporting

- To develop annual budgets, provide regular income and expenditure forecasts, and report monthly on KPIs.
- Work closely with our Development Manager (Individual Giving) to understand pipeline implications. Review and report on progress to ensure activities are run within budgeted expenditure and maximise income.

General

- To play an active role within the Team, working effectively with colleagues to achieve objectives.
- To work closely with the Grants Department to facilitate a better understanding of the needs of our beneficiaries and the impact of our work, to support increased income generation.
- To act in accordance with the Charity's GDPR Policy to ensure data remains confidential and is used appropriately.
- Understanding of Charity Law and all other legislation relating to fundraising and income generation
- To represent the organisation to appropriate donors, partners and networks to secure and/or maintain support.

Person Specification

	Essential	Desirable
Education		
Minimum of 5 GCSEs including Maths and English.	✓	
A recognised legacy administration qualification, such as the Institute of Legacy Management's Certificate in Charity Legacy Administration (CiCLA) or be a qualified private client solicitor / STEP member (or have significant experience in the area of Wills & Probate)		✓
Experience of working in a similar charity and / or legal probate role, with a good degree of competence obtained from putting knowledge into practice.	✓	✓
Good working knowledge of Probate and Trust Law, and particularly how this relates to Income Tax, Inheritance Tax and Capital Gains Tax together with relevant Charity Law legislation.		
Experience in line managing and/or a desire to learn, and a commitment to supporting the team to be the best they can be.	✓	

Experience		
At least 2 years in legacy fundraising	✓	
Proven competence in electronic information management.	✓	
Understanding and empathy for the Royal Navy, Royal Marines and Charity Sector.		✓
Knowledge		
Computer literate; proficient in using Microsoft Outlook 365 suite of tools: TEAMS, Word, PowerPoint, Excel	✓	
Experience in using BlackBaud Raisers Edge software and database applications		✓
Knowledge of the Charity or military sector		✓
Skills/ Aptitudes		
Enjoys working with people	✓	
High level of written and spoken communication and interpersonal skills	✓	
Able to respect the importance of confidentiality	✓	
Patient, tactful, diplomatic and approachable.	✓	
Be able to deal with people in stressful or upsetting situations	✓	
Able to streamline and improve operational processes, develop plans and policies	✓	
Flexibility and adaptability to prioritise and juggle a range of different tasks and to meet deadlines.	✓	
Confident in gathering facts and statistics and making financial calculations		
Proven ability to take responsibility for tasks and use initiative.	✓	
Ability to work both on own and as part of a wider team.	✓	
Exceptional organisational skills.	✓	
Show dedication to completing tasks, with minimal supervision and direction.	✓	
Be able to work accurately with good attention to detail.	✓	
Possess appropriate right to work in the UK. This role requires a DBS and basic security checks.	✓	