Job Description

Legacy Executive

Grade: 8

Directorate: Fundraising, Marketing and Communications (FMC) **Location:** HQ, WWT Slimbridge

Reporting to: Legacy & Development Manager

Main function of the post: To support the Legacy & Development Manager with a range of activities e.g. administration, marketing, and stewardship to maximise legacy, in-mem and mid-value giving.

Supervisory Responsibility: Volunteers and external agencies as required

Main duties of the post

1. Be responsible for the daily case work associated with legacy donations. supporter management of a budgeted £220k of income each month. Liaising with internal and external support teams and the legacy development manager, where necessary, to maximise legacy income to WWT.

2. Manage a series of events associated with the stewardship of legacy and mid-value supporters.

3. Work with the wider supporter engagement team and the FMC directorate to develop and implement co-ordinated and planned, supporter-centric marketing campaigns and communications for the legacy and mid-value audiences.

4. Be responsible as the first point of contact for supporter enquiries, ensuring whether through the phone, email, post or face-to-face, an excellent level of service is provided.

5. Be responsible for the maintenance of accurate, compliant supporter and legacy case records in the CRM and ensure processes and procedures are maintained and reviewed periodically, to support the Legacy Development Manager and the finance team with reporting of legacy income and regular reviews of legacy processes to ensure compliance and accuracy in line with industry standards.

6. Work with the Insight team to provide data insight and analysis of legacy prospects and pledgers and mid-value supporters to inform campaigns and our stewardship work with the Philanthropy team.

7. Work with colleagues across the FMC directorate to ensure that the trust is compliant with General Data Protection Regulation, Gift Aid and Fundraising Regulations

8. Provide general administrative support as required to enable the effective running of the wider supporter engagement team.

9. To be responsible for engaging with the WWT Sustainability Statement, being aware of negative environmental impacts and incorporating sustainable ways of working within your role.

10. To be responsible for working within the WWT health and safety policy and guidelines ensuring that the health, safety and wellbeing of yourself and others is an integral part of how you work.

In addition to the duties and responsibilities listed, the post holder is required to perform any other reasonable duties that may be assigned by the supervisor shown above, from time to time.

Date raised: June 2019 **Amended:** Sept 2026

Person Specification

1. Qualifications

Essential:

- Educated to 'A' level standard or equivalent (including GCSE English Language and Maths at A-C)
- Current driving licence as occasional travel to other WWT sites will be required

Desirable:

- Educated to degree level or equivalent, ideally in a business, marketing or events related discipline

2. Experience

Essential:

- Demonstrable understanding of legacy giving and experience of legacy administration
- Excellent organisational skills and working with limited supervision
- Excellent customer service skills and communication skills, including experience of liaising with a broad range of people, both internally and externally, by phone, email and letter
- Experience of working in a marketing or fundraising department
- Experience of developing and managing events
- Excellent attention to detail
- Experience of financial systems
- Ability to prioritise own workload and work to tight deadlines
- Excellent Microsoft Office and database skills

Desirable:

- Experience using Access Database (ThankQ)
- Understanding of General Data Protection Regulation and Fundraising Regulations
- Membership to ILM/IOF or similar
- Experience of reading or dealing with legal documentation

3. Managerial & Supervisory

Essential:

- Ability to supervise external agencies or contractors

Type of staff	Number managed	Number supervised
Employed Staff	0	0
Volunteers / Casual Workers	0	1
Contractors	0	2

4. Responsibility

Essential:

- Ability to project manage, managing a number of tasks at one time
- Ability to prioritise effectively, balancing deadlines and workloads with a focus on maximising legacy income
- Ability to liaise with colleagues from across WWT as well as other co-beneficiary charity contacts, solicitors and supporters professionally
- Representing WWT at all times
- Ability to work on own initiative
- Responsible for delivering work on time and within budget
- Responsible for maintaining up-to-date donor, expenditure and administrative records
- Responsible for handling legal documents and personal data on supporters and legacy pledgers within the GDPR and Fundraising regulations framework

Levels of Responsibility:

Type of Responsibility	Level (£'s)
Expenditure (exc. payroll)	£1,000
Cash Handling	£3m+
Assets (required for job, exc. buildings)	N/A
Visitors (per annum)	N/A

5. Creative Ability

Essential:

- Proactive approach to workload
- Strong numerical and analytical skills
- An innovative approach to developing solutions
- Strong written skills, able to write with fluency, creativity and sensitivity
- Excellent attention to detail and a high level of accuracy
- Excellent time management skills and able to prioritise own workload effectively

6. Contact

Essential:

- Confident liaising with colleagues across the organisation at all levels
- Confident in speaking with supporters and external agencies on a daily basis
- Confident and effective verbal communication skills
- Ability to be diplomatic and empathetic when discussing difficult issues and talking to bereaved families
- Be respectful of all, in line with WWT's inclusivity stance.

Desirable:

- Experience of working with teams across different sites
- Experience in a position dealing with contested wills

General Notes

The post holder will on rare occasions be required to work out of office hours, such as during evenings and weekends, to meet the requirements of the job.