

JOB DESCRIPTION

JOB TITLE LEGACY PARTNERSHIP MANAGER

JOB PURPOSE:- To lead the development and delivery of a legacy marketing and engagement programme across Age UK Leicester Shire & Rutland, Age UK Coventry and Age UK Northamptonshire. The post holder will play a key role in growing legacy and individual giving income to support vital services for older people.

They will act as the main point of contact for legacy enquiries, provide exceptional supporter stewardship, and design and deliver effective multi-channel campaigns to increase awareness and inspire legacy giving. Working collaboratively with internal teams and external partners, the Legacy Partnership Manager will help secure sustainable income, ensuring older people in our communities continue to receive the support they need.

ACCOUNTABLE TO : The Chief Operating Officers based at Age UK Leicester Shire & Rutland, Age UK Coventry & Warwickshire & Age UK Northamptonshire.

SUPERVISED BY : Corporate Partnership Manager

MAJOR TASKS

- Lead and develop a legacy marketing programme across the three locations covering Leicester & Leicestershire, Coventry & Warwickshire and Northamptonshire.
- Provide marketing material to promote the project and the partnership.
- Play a key role in growing individual giving income to support vital services.
- Act as the main point of contact for legacy enquiries, providing excellent stewardship to supporters.
- Develop, manage and deliver legacy campaigns to raise awareness and income.
- Travel to all three areas/locations, having your own vehicle with a full clean driving licence, along with the ability to gain business insurance, is essential.

KEY RESPONSIBILITIES

1. Provide clear and compassionate information about legacy giving. Develop and execute the Legacy Giving plan.
2. Create engaging campaigns and materials that encourage supporters to include all three partners of Age UK Leicester Shire & Rutland, Age UK Coventry & Warwickshire & Age UK Northamptonshire.
3. Develop and deliver engaging legacy communications and materials, including case studies and supporter stories.
4. Build Key Relationships: Work closely with internal teams, our national Age UK Legacy Team, and local solicitor and will-writing networks to raise the charity's profile.
5. Oversee Administration: Manage a portfolio of legacy leads and gifts, ensuring accurate records and compliance with legal and financial requirements. Serve as the main point of contact for legacy supporters and enquirers.
6. Build strong, sensitive and long-term relationships with supporters.

7. Plan and implement legacy marketing campaigns to increase awareness and income.
8. Develop annual legacy marketing and supporter engagement plans aligned with fundraising campaigns.
9. Liaise with the Marketing team to create digital and social media content to reach new & existing audiences.
10. Collaborate with Age UK Coventry and Age UK Northampton to deliver joint legacy activities.
11. Work closely with internal teams and external agencies to maximise campaign efforts.
12. Establish and cultivate relationships with solicitors and will-writing networks across the regions.
13. Track and analyse campaign performance.
14. Test and adapt tactics to find the most effective approaches.
15. Manage legacy files in line with legal frameworks and liaise with solicitors, executors, and families.
16. Maintain accurate supporter and financial databases and track legacy income.
17. Contribute to the development of a growing service.
18. Provide exceptional support to legacy pledgers and enquirers through meetings, events, and personalised communications.
19. Ensure that everyone using the service has provided signed written/verbal consent to Age UK Leicestershire & Rutland, Age UK Coventry & Warwickshire and Age UK Northamptonshire to contact them in relation to the service and how the details are stored and kept up to date.
20. Ensure all teams are trained, supported, and confident to raise and discuss the opportunity of leaving a legacy with supporters.
21. Ensure you are compliant with the policy and procedures that include GDPR.

Training and Development

1. Undergo mandatory and departmental training and development as required.
2. Evaluate training undertaken and integrate it into your work programme.

Health and Safety

1. Adhere to a Health & Safety Policy and related policies mentioned therein.
2. Where applicable, ensure project activities are risk assessed in line with the organisation's Health and Safety policies and procedures.

Working Practices/General

1. As well as the Health & Safety policies and procedures above, adhere to and implement all partner policies and procedures, as well as the personal Care Policies if relevant to your role.

Details of these and other Age UK Leicester Shire & Rutland policies can be found in [F:\COMMUNAL FOLDER\POLICIES](#) or on the Cezanne self-service portal.

2. Age UK Leicester Shire & Rutland, Age UK Coventry & Warwickshire & Age UK Northamptonshire are committed to their charitable aims, and fundraise to provide accessible services for the older people of Leicester, Leicestershire and Rutland. Age UK Leicester Shire & Rutland expects all its employees to partake, when possible, in events which support these charitable aims.

3. All partners expect all staff to have good IT skills to enable them to use the systems within individual locations and have a willingness to embrace new technology as it is introduced. Training will be provided to staff who require it.
4. To undertake any other duties that may reasonably fall within the purview of the job.

This Job Description sets out the responsibilities of the post at the time it was drawn up. Such responsibilities may vary from time to time without changing the general character of the post or level of responsibility entailed. Variations are a common occurrence and do not of themselves constitute additional responsibilities.

Signed: _____ **Date** _____

Please print name: _____