

JOB DESCRIPTION & PERSON SPECIFICATION

# 1. JOB DETAILS

Job title: Senior Legacies Manager

Department: Philanthropy (High Value Giving team)

Location: Marylebone Road – hybrid working with min 60% at the Academy

Responsible to: Deputy Director of Philanthropy

Direct reports: None

Responsible for: Managing a portfolio of legacy donors and potential donors

Developing and implementing legacy fundraising and marketing activity

Contacts: Colleagues across the Academy, donors, students, alumni

2. PURPOSE OF THE JOB

Gifts in wills make up around 30% of the Academy’s fundraised income each year. The Senior Legacies Manager will lead the Academy’s expanding legacy fundraising programme, managing a portfolio of current and prospective high-value legators, principally at the six- and seven-figure level, while developing and implementing the Academy’s legacy fundraising and marketing strategy. The Senior Legacies Manager will also work closely with an external legacy administration provider and prepare reports for the Academy’s Senior Management Team to ensure that legacies in administration align with the Academy’s Legacy Policy.

As a member of the High Value Giving team they will also contribute to wider departmental fundraising activity, planning and delivering a range of shared events and activities.

The successful candidate will have (1) experience in developing a legacy strategy and managing successful legacy marketing campaigns and (2) a proven record in securing six- and ideally seven-figure legacy pledges, and managing relationships with high-value legacy pledgers. The role requires a thorough understanding of legacy fundraising and marketing best practice and some familiarity with the regulatory framework regarding gifts in wills. A drive to unlock the potential of arts and cultural philanthropy, especially for music, is essential.

3. KEY ACCOUNTABILITIES

**Strategy**

* Work with senior colleagues to develop and implement a multi-year legacy strategy across fundraising, marketing, and stewardship, including income targets and measurable performance metrics
* Create and manage the annual plan and budget for legacy marketing
* Work closely with the Academy’s legacy administration provider in order to build an understanding of legacy income forecasting to support organisational reporting
* Develop, improve and implement the legacy stewardship journey
* Measure and report on progress against the legacy strategy, making data-driven decisions and adjusting the approach as required.

**Fundraising**

* Build and maintain strong relationships with an existing portfolio of high-value legacy pledgers and potential legacy pledgers (up to and including seven-figure pledges) through face-to-face meetings, bespoke activities such as visits to the Academy or off-site programmes, and one-to-one communications
* Identify and engage prospective new legacy pledgers at the six- and seven-figure level, building relationships with them and sensitively asking them to make legacy pledges
* Navigate complex discussions with potential legacy pledgers regarding the direction of legacy gifts, ensuring that the donors’ interests are balanced with the Academy’s needs and strategic priorities
* Collaborate with high-value fundraisers to secure legacy pledges from lifetime donors
* Manage and develop the Hilda Bor Circle, the Academy’s flagship stewardship programme for legacy pledgers and their families, including planning and executing annual events and communications
* Maintain a thorough and up-to-date knowledge of legacy fundraising best practices.

**Marketings and Communications**

* Develop and deliver a data-driven legacy marketing and communications strategy to Academy audiences and donors, working with colleagues in Philanthropy and in Communications, Marketing and Audiences
* Create sector-leading legacy marketing materials and assets using a range of channels including print and digital, to promote legacy giving to the Academy’s current supporters and audiences, and look for ways to extend the reach of legacy marketing and communication to new potential donor groups
* Integrate legacy marketing and communications with the Academy’s wider internal and external communications and marketing
* Work across the organisation to increase awareness of the value and impact of legacy giving at the Academy

**Policy, Procedure and Compliance**

* Maintain the Academy’s Legacy Policy, in line with the latest best practice and regulations, with the Deputy Principal (Advancement) and Director of Finance
* Work closely with an external legacy administration provider on the acceptance of bequests, and prepare reports for Senior Management Team to ensure that legacies in administration align with the Academy’s Legacy Policy, working with the Senior Advancement Operations Manager, colleagues in the Finance Department, and legal advisors.
* Keep up-to-date on changing regulations regarding gifts in wills and legacy estate management
* Maintain the Raiser’s Edge NXT database as an accurate record of legacy activity and giving
* Undertake all duties in an ethical way and to the highest standards of fundraising best practice, in accordance with the Academy’s Legacy Policy, Gift Acceptance procedure and Donor Charter, and all relevant Data Protection and other fundraising regulation.

**Other duties**

* Travel within London and the UK to attend meetings and events, with some activity outside normal working hours to be expected
* Operate strictly within agreed expenditure
* Carry out any other duties that are within the scope, spirit and purpose of the job, as requested by the line manager and department Directors.
1. NATURE & SCOPE

The Royal Academy of Music moves music forward by inspiring successive generations of musicians to connect, collaborate and create. From pre-school to post-doc, our students come here from more than 50 countries. We challenge them to find their own voice, take risks and push boundaries. Simon Rattle, Felicity Lott, Elton John, Edward Gardner, Evelyn Glennie and Jacob Collier all learnt their craft here.

Every student benefits from a stimulating curriculum and an ambitious range of concerts and events. Legendary artists come here not just to perform, but to become mentors, friends and musical partners.

A world of music comes to us – and we send music back out into the world. As we embark on our third century, our aim is to shape the future of music by discovering and supporting talent wherever it exists.

Music never stands still – and nor will we.

Philanthropy plays a significant role in the life of the Academy and supports our mission to develop and educate the musicians of tomorrow. The Royal Academy of Music’s Future campaign was launched in 2022 with a target of £60m, making it the most ambitious campaign for a conservatoire outside the US. Progress to reach the campaign target is well ahead of schedule.

The Philanthropy team is led by the Director of Philanthropy who reports to the Deputy Principal (Advancement). The Deputy Principal (Advancement) has responsibility for all philanthropic income, marketing, alumni and communications. The Philanthropy team includes:

Donor Relations team

Head of Donor Relations, Philanthropy Officer, Events Manager, Events Coordinator, Donor Communications Officer, Philanthropy Administration Officer

High Value Giving team

Deputy Director of Philanthropy, Head of Philanthropy, Senior Philanthropy Manager (Trusts and Foundations), two Senior Philanthropy Managers, (Senior) Legacy Manager, Philanthropy Manager, Executive Officer (Philanthropy)

Prospect Research team

Head of Prospect Research and Pipeline Management, Prospect Management Coordinator

Advancement Operations team

Senior Advancement Operations Manager, Database Manager, Donations and Database Officer

Philanthropy team members work closely with the Marketing, Communications and Audiences team, under the leadership of their Director, who also reports to the Deputy Principal (Advancement). The two teams are collectively known as the Advancement team.

GENERAL:

This job description reflects the present requirements of the post. As duties and responsibilities change and develop the job description will be reviewed and be subject to amendment in consultation with the postholder.

1. The postholder will be expected to carry out any other duties that are within the scope, spirit and purpose of the job, as requested by the line manager or Head of Department.
2. The safeguarding and welfare of our students is at the heart of our institution. We require all staff, students and volunteers to commit to the safeguarding and wellbeing of our students, in accordance with the Academy Ethics and Conduct policy, Code of Practice, and Safeguarding Policy. Reporting of any concerns, anonymous or named, can be made through the Report & Support system at <https://reportandsupport.ram.ac.uk>
3. Flexibility will be required by the post holder to attend concerts in the evening on some occasions and international travel will be required.
4. All employees have a duty to comply with the Academy Equality, Diversity & Inclusion policy, and to promote and advance equality, diversity and inclusion policy throughout the duration of employment.
5. You are required to periodically familiarise yourself with Academy employment policies and procedures, and act in accordance with them. These can be found on SharePoint, the Academy intranet, at the link below. By accepting the contract and job description, you agree to this. <https://royalacademyofmusic.sharepoint.com/sites/HR>

PERSON SPECIFICATION

Job Title**:** Senior Legacies Manager Grade:6

Department:Philanthropy Date:April 2024

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| ATTRIBUTES | ESSENTIAL | DESIRABLE |
| SKILLS/KNOWLEDGE/COMPETENCIES | Outstanding communication skills, both in writing and in person, with a track record of communicating complex information to a variety of audiencesAbility to develop strong relationships with individuals and discuss their legacy giving plans with them and their representatives with tact and sensitivity, sometimes navigating complex discussionsExpert in legacy marketing and fundraising methods, or similar in other contexts, including the development of marketing and communications campaigns to drive incomeAbility to establish, maintain and develop positive relationships with a wide range of individuals at a senior level, both within a team and across organisationsThe ability to think strategically and creatively to devise engagement, cultivation, solicitation and stewardship activities for legacy pledgers in the short, medium and long termThe ability to work strategically with senior leaders to develop and maintain complex organisational policies and proceduresThe ability to make the case for supporting a cause with creativity, authenticity and integrity, through written and verbal proposals, reports and presentationsThe ability to understand the strategic objectives of the Royal Academy of Music and how legacy giving can support and potentially conflict with these aimsCollaborative team working skills, with the ability to guide, support and share knowledge with colleaguesStrong numeracy, budgeting, research and analytical skillsExcellent and self-supporting IT skills, including confident use of the Microsoft Office toolset and the internet, and broad competence in a range of software applications including email, web browsers, file-sharing software etc.Strong knowledge of relevant charity legislation regarding gifts in wills and legacy estate management.Strong knowledge of legacy giving best practices and fundraising trendsKnowledge of GDPR, and Fundraising Regulator code of practice | Understanding of the power of philanthropy to impact the arts, culture and higher educationExperience of fundraising CRMs, ideally Raiser’s Edge NXTDegree of musical competency and/or musical appreciation |
| **EXPERIENCE** | Demonstrable experience of securing legacy pledges at the six- and preferably seven-figure levelSignificant experience in managing a portfolio of high-value legacy pledgers that include complex relationships (e.g. interests and relationships across a large organisation, high capacity to give, projects with multiple stakeholders)Experience of managing a legacy marketing and stewardship programme including a range of high-quality events and communicationsExperience of developing annual and multi-year strategic plans that balance in-year activity with long-term growth.Experience of working with legacy administration providers or with colleagues internally on the acceptance of legacies in administrationExperience of working with senior leadership to develop and/or maintain an organisation’s legacy giving policies and proceduresA proven track record of influencing and negotiating with senior stakeholders. Significant track record of producing compelling, creative, accurate and timely proposals for legacy gifts and reports on the impact of gifts, communicating complex artistic and technical information to a lay audience Experience of working collaboratively as a proactive team member, and contributing to shared team objectivesExperience of planning and prioritising a number of projects simultaneously | Experience of fundraising within an arts or educational establishment. |
| **QUALIFICATIONS/****TRAINING** | There are no specific qualifications required. We are looking for personal qualities, relevant experience and a desire to learn on the job. | High-quality professional qualifications or training in fundraising, marketing or management***,*** especially relating to legacy fundraising. |
| **PERSONAL ATTRIBUTES** | Credibility as an ambassador for the Academy, able to work and communicate effectively at senior levelsHigh levels of professionalism, self-motivation, organisation, and significant attention to detailGoal orientated with a positive approach to problem-solvingPractical approach to the tasks in hand and ability to work consistently and methodically when under pressure and/or facing tight deadlinesArticulate, persuasive and able to match organisational needs to fundraising opportunitiesAble to work in a collaborative and supportive way within a team and across an organisationAbility to deal with confidential matters and act with sensitivity and discretionCommitment to the purpose and ethos of the department and Academy | Passion for and commitment to the arts - ideally music - and education, and the transformative power of both |



The Academy will shortlist for interview any candidate who has identified a disability and demonstrated that they meet the essential criteria listed above.