

The Myton Hospices

Job Description

Job Title: Legacy Administration Officer

Department: Fundraising

Responsible to: Individual Giving Manager

Hours of Work: 15 hours per week over 2-3 days (though working patterns can be discussed)

Primary Work Base: Warwick

NB as we are a multi- site organisation some flexibility relating to place of work will be required. We reserve the right to change the work base of our employees to meet our business needs.

Summary of Role:

To provide administrative support related to legacies fundraising as directed by individual giving team members and the Director of Strategic Partnerships & Major Philanthropy (DoSP&MP), and to provide broader administrative fundraising support as required.

The role will primarily be accountable for managing and stewarding legacy income through practical application of the administration process in relation to all legacies notified to and received by Myton.

Key Internal Relationships for this role:

Individual Giving Manager, Director of Strategic Partnerships & Major Philanthropy, Fundraising Managers, wider Fundraising Team, Lottery Team, Retail Team, Senior Leadership Team, Finance Team.

Myton Core Values

Our Core Values underpin everything we do and all employees are expected to comply with our Values and reflect these in their day to day work.



Main Duties & Responsibilities

1. Maintain the records of all legacies notified to Myton as received or receivable
2. Monitor notification reports and examine estate accounts to ensure Myton has received what it has been bequeathed from the estate
3. Ensure the smooth running of the administration of estates and the expeditious receipt of income
4. Liaise with solicitors and executors on progress of estate administration and be the main contact for all correspondence / follow ups
5. Ensure any inheritance tax / probate implications are addressed / identified for the benefit of Myton
6. Give instruction on property / share sales involved with the estate (in liaison with the Director of Strategic Partnerships & Major Philanthropy)
7. Where necessary, correspond with co-beneficiaries to gather information and decide upon best course of action
8. Maintain and update paper and fundraising database files accordingly
9. Prepare monthly legacy updates for the DoSP&MP
10. Work in conjunction with the Individual Giving Team and support accordingly with the overarching legacy plan for the organisation
11. To build effective relationships with supporters to maximise the income generated for The Myton Hospices as well as ensure a great supporter experience
12. Attend legacy events / supporter engagement activities where required

Other administrative duties

- To undertake communication and correspondence for the DoSP&MP, as directed
- To organise and book in fundraising meetings as agreed with the DoSP&MP
- To take minutes at meetings, write up notes and circulate to the fundraising team accordingly
- To assist the DoSP&MP and fundraising team in the smooth running of campaigns and initiatives as and when required

General

- To participate in annual appraisal and training as identified
- To participate in mandatory training appropriate to the post
- To abide by the policies and procedures of The Myton Hospices
- Any other duties commensurate with the post

GENERAL RESPONSIBILITIES & OBLIGATIONS OF ALL EMPLOYEES

Policies and Procedures

The post holder is required to have a good understanding of and to comply with all relevant Myton policies, procedures and guidelines. Any contravention of Myton policies or procedures may result in disciplinary action.

Volunteers

Myton recognises the valuable contribution that volunteers make and we expect all employees to be able to support and work effectively with our volunteers.

Confidentiality and Data protection

It is a requirement of employment with Myton that all staff must comply with the obligation of confidentiality relating to personal information that could identify individuals. The Data Protection Act 1974/1998 safeguards the handling of information held in both electronic and manual filing systems and it is the duty of all staff employed by Myton to uphold the principles of the Act, adhere to Myton policies and to maintain strict confidentiality at all times.

Infection Control

All employees of Myton must be aware of infection prevention and control policies and are expected to follow them at all times. Any breach of infection control policies which places patients, visitors or colleagues at risk may result in disciplinary action.

Equality & Diversity

The post-holder must at all times carry out his/her responsibilities in line with Myton's Equality & Diversity Policy.

Health & Safety

Employees must be aware of the responsibilities placed upon them under the Health and Safety work Act 1974, to ensure that the agreed safety procedures are carried out to maintain a safe working environment for patients, visitors and colleagues. The post holder is required to conform with Myton's policies on Health and Safety and Fire Prevention, and to attend related training as required.

Safeguarding Vulnerable Adults and Children

It is the duty of all staff working for Myton to safeguard children and vulnerable adults and undertake safeguarding training at an appropriate level.

Code of Conduct

Employees are required to represent Myton in a positive light and embody the corporate identity in appearance, demeanour, values and ethics.

Review of Job Description

This job description is an outline of the key duties and responsibilities of the role and is not intended as an exhaustive list. The job description may change over time to reflect the changing needs of the service. The post holder may be required to undertake other duties that could reasonably be considered commensurate with the post.

This job description is subject to periodic review and may be changed/updated following consultation with the postholder(s).

Employee/Managers Signature

I agree that this Job Description is a true reflection of the main duties and responsibilities of my role:

Employee Name: _____

Signature: _____ **Date:** _____

Managers Name: _____

Signature: _____ **Date:** _____