

Legacy and In Memory Manager

Recruitment Pack

WILTSHIRE
+BATH AIR
AMBULANCE
Going above + beyond



Welcome

It is my pleasure to extend a warm welcome to you as you consider joining our Wiltshire and Bath Air Ambulance Charity family.

The team who work with us here at the charity are our most important asset.

Upon joining us, you will become part of a dynamic, fast-growing organisation which is committed to being a safe and effective clinical care provider.

People are at the centre of everything we do; we aspire to be values driven and work together in an open and honest culture.

We believe every employee plays a part in saving lives, no matter what their role in the organisation. We are one team with one goal.

We treat everyone with dignity, value their contributions and help one another succeed.

We very much consider ourselves a family, and we hope that anyone who chooses to join us will feel as privileged as we do to work for such an amazing charity.

We have plans in place for a very exciting future and we would love you to join us on our journey!



David Philpott
Chief Executive



**Our journey starts with
our mission statement,
which is simple.**

We save lives.

We do this by raising sufficient funds
to finance an air ambulance service in
Wiltshire and Bath.

All our activities across the organisation
are informed by our Mission, Vision,
Values and Culture.



OUR VALUES

Teamwork



We are one team, with one goal, and embrace collective genius.

Respect



We treat everyone with dignity, value their contributions and help one another succeed.

Passion



We are committed in mind, body and spirit.

Excellence



We aspire to be the best in everything we do and strive for continuous improvement.

Personal touch



We will be real, honest, inclusive and transparent in all our dealings with each other and our supporters.

Integrity



Every donor and supporter will be valued in exactly the same way, irrespective of size of donation or other contribution to the charity.

Communicate



We will communicate with people so they are informed of all important matters in a timely way - whilst also recognising that some matters are personal or commercially confidential.

Planet



We will be a responsible charity and make a difference by using local companies and where possible sourcing recycled and sustainable materials.

We have an aspiration to offset our carbon emissions where possible. Our building is fitted with energy saving light bulbs, high specification insulation and natural ventilation and cooling.

OUR IMPACT



STUART FROM WESTBURY'S STORY

"They saved my life."

But it's not just my life they saved. It meant I could get married and we have our two beautiful daughters.

After collapsing at home in Westbury, they flew me to Southmead Hospital within 11 minutes. If we'd gone by road it would have taken over an hour to get there and it's unlikely I'd be telling you this story now.

WESTEK, MELKSHAM

"Choosing Wiltshire and Bath Air Ambulance Charity as our Charity of the Year has provided a focus for our fundraising and community work. Besides making a difference to such a vital local charity, our fundraising activities are great for fostering teamwork and having fun."

Wendy Dorkin, Westek – HR Manager



IAN BEST – VOLUNTEER

"For anyone who is considering volunteering, don't just think about it, get on and do it! What else could you do that will give you so much fun, take you places you may not go to otherwise and do your bit to keep the critical service flying, all at the same time?"

Ian Best, Volunteer since 2013



JOB DESCRIPTION

POST:	Legacy and In Memory Manager
BASED:	Hybrid; at our state of the art airbase in Outmarsh, Semington, BA14 6JX, where our charity team and crew work alongside each other, with some days working from home
REPORTS TO:	Deputy Director of Income Generation
SALARY:	ca £30,000 FTE
HOURS:	Four days per week

SUMMARY:

We are Wiltshire and Bath Air Ambulance Charity. We provide critical medical care by land and air, across our communities.

We're here when you need us most, but in the nicest possible way, we hope you won't.

This role is pivotal in maximising the charity's income from gifts in wills and in memory donations, whilst delivering exceptional levels of supporter care.

The post holder will be responsible for developing, implementing, and actively promoting the charity's gifts in wills and in memory strategies, ensuring these vital income streams are embraced at all levels of the organisation.



RESPONSIBILITIES:

- To lead on the development and implementation of the legacy and in memory strategies, developing annual plans and budgets to grow the legacy prospect and pledger database to secure future years' income.
- Develop, manage, and grow the legacy and in memory portfolio.
- To develop and project manage legacy and in memory campaigns in conjunction with the marketing and communications team.
- To identify, and develop appropriate, personalised supporter journeys for legacy prospects and pledgers, ensuring the delivery of an outstanding supporter experience.
- To manage and develop the charity's Free Wills Service, ensuring best practice and appropriate safeguards are maintained at all times.
- To line manage the charity's external legacy administrator, who currently handles our active case files, reporting and forecasting.
- Ensure that legacy gifts are administered effectively and proactively to maximise the potential value of the gift to the charity.
- Using our CRM database and other sources, identify and steward the pipeline of potential legacy donors, in particular maximising on any opportunities to steward in memory donors towards legacy giving.
- Maintain the charity's donor relationship database (CRM system) and paper files to ensure all related records are accurate and up-to-date, and ensuring that this is recorded for the charity's future use.
- Keep abreast of developments within the sector and changes to fundraising practice and/or probate law and communicate these to the wider organisation as appropriate.

RESPONSIBILITIES:

- Conduct benchmarking in relation to legacy and in memory trends within the sector.
- Lead on ensuring that the wider team (including volunteers) are able to champion legacy and in memory giving, including delivering ongoing training and support and acting as an ambassador and role model for your income areas.
- Identify new funding opportunities with stakeholders and ways of working with influential supporters which will include peer to peer fundraising and working with our senior management team.
- Monitor your portfolio, prepare required analysis and data for monthly and quarterly reports as well as contribute to forecast and reforecast planning and report back.
- Facilitate airbase visits with both legacy and in memory supporters, ensuring that the visit is planned and appropriate for all parties, understanding the needs of those attending and arranging the visit accordingly.
- To plan and arrange legacy and in memory events. In particular Legacy Pledger, Legacy Enquirer events as well as our annual In Celebration of Life Service for our In memory supporters.

PERSON SPECIFICATION

- Minimum of two years' experience in a supporter/client facing role, ideally within the charity/public/healthcare sector.
- Ability to support bereaved individuals with sensitivity, empathy and care (bereavement training is available).
- Experience of developing and implementing legacy and in memory strategies, marketing campaigns and stewardship journeys.
- Understanding/experience of charity legacy administration an advantage but not essential.
- Confident communicator with the ability to inspire internal and external stakeholders at all levels.
- Confident with speaking to groups / presenting (additional training can be provided).
- Organised and methodical, with a meticulous eye for detail.
- Experience of managing projects and/or events with clear targets.
- Good understanding of marketing, communication and database management.
- Ability to collaborate to deliver shared projects but also work alone and manage tasks independently.
- Passion to provide first class supporter care.

RECRUITMENT PACK | LEGACY AND IN MEMORY MANAGER

BENEFITS:

We offer a generous package including 25 days annual leave (FTE) plus bank holidays and your birthday off, Health Cash Plan, Group Life Assurance (3 x salary, conditional upon still being employed by the charity), Blue Light Card discounts, up to 6% employer pension contributions, ongoing development, free parking, and access to electric vehicle charging at our airbase.

BASE:

Hybrid; at our state-of-the-art airbase in Outmarsh, Semington, BA14 6JX, where our charity team and crew work alongside each other, with some days working from home.

TRAVEL:

Being able to drive and having use of your own car is ideal given the location of the airbase and lack of public transport options. HMRC mileage allowance will be paid when travelling on work-related business.

FACILITIES:

You will be supplied with equipment relevant to your role.

This job description is subject to review and alteration in light of future change or developments.

HOW TO APPLY

To apply please send us a copy of your CV and a covering letter of no more than two pages to: kellie.chandler@wbairambulance.org.uk. Please state whether you have a preference for full or part time work.

For further information about the role please contact: rebecca.delabedoyere@wbairambulance.org.uk.

For further information about our charity, please visit our website wiltshirebathairambulance.org.uk/careers.

CLOSING DATE

9am Wednesday 8 January 2025