



JOB DESCRIPTION

Title: Legacy Manager

Reports to: Head of Membership and Interim Head of Legacies and Endowment

The Royal Ballet and Opera is for people not profit, funded in part by the generosity of our donors, members and those who leave gifts in wills. The majority of legacies are directed towards the Royal Opera House Endowment Fund which annually awards grants to fund productions, backstage departments and our extensive learning programme. This role sits in the Development and Advocacy Team, responsible for raising £30m plus per year.

Main purpose of the job

Based within the Development and Advocacy Department, this new role will be part of the Legacy team, working alongside the Interim Head of Legacies and the Legacy Coordinator. The role is to promote and administer legacies, work with potential and existing legacy givers and help ensure legacies left to the Royal Ballet and Opera are administered sensitively and recorded robustly. The role holder will need to be comfortable managing difficult and sensitive situations, able to communicate in writing, face to face and on the telephone, and able to articulate the value of legacies to a variety of audiences in a variety of ways. There will be a requirement for UK travel and occasional overnight stays.

Main Responsibilities

Promoting and Cultivation

- Work with the Interim Head of Legacies to research and implement new ways of talking about the value of gifts in wills including on and off-site face to face conversations with potential pledgers
- Create impactful marketing materials including brochures, adverts and editorial
- Help to devise, send and monitor legacy marketing campaigns using mail and CRM
- Devise and deliver an inspiring events programme for existing and potential legacy pledgers (Batons)

- Create an interesting and informative supporters' comms plan, including regular updates
- Research external legacy channels including working with solicitors, Remember a Charity and Legacy Month
- Liaise with families where appropriate including tours and impact reporting
- Help commemorate legacies including creation of a donor wall and updating website and programme lists
- Champion legacy giving across the wider department and Royal Ballet and Opera
- Stay up to date with legacy trends and best practice

Legacies Administration

- Respond to enquiries and existing legacy pledgers (Batons) in a timely and sensitive manner
- Help manage the Legacies inbox, responding to Solicitors and Executors where appropriate
- To maintain Baton and legacy plans on the current database (Tessitura) and ensure all legacies and payments are recorded correctly
- To maintain the crediting and tracking spreadsheet and ensure all correspondence is correctly stored

Management Information

- Maintain excellent working knowledge of the customer database (Tessitura), using plans to track legacies, provide data and run reports from defined selection criteria as needed, working to department standards with all customer data
- Undertake training and maintain up to date skills as needed in order to be able to run either routine or new queries from the database in response to management information needs
- Advise with new developments, including testing, troubleshooting for data and reporting needs, and undertake ad-hoc tasks as required

PERSON SPECIFICATION

Essential Knowledge, Skills and Experience

Legacy Experience

- Experience of working with Legacy giving and administration
- Experience of databases and MS Office (Access, Word and Excel); some working knowledge of Tessitura or other CRM systems or ability to learn
- Possession of or interest in working towards an ILM qualification
- Some knowledge of or interest in opera or ballet with the ability to inspire others about the artforms

Customer Facing Skills

- Consistent high level of customer care and responsiveness
- Friendly, confident and professional telephone and in person manner
- Diplomacy in dealing with a variety of situations and different customer groups
- Ability to promote RBO legacy giving and gain knowledge of products and services in a relatively short period of time

Core Skills

- Strong communication skills with high standard of verbal/written English
- Strong organisational and administrative skills
- Logical and methodical approach to work
- Ability to work effectively under pressure, prioritise and multi-task
- Numeracy, accuracy and attention to detail
- Capacity to manage a busy workload with high productivity
- Ability to assimilate new information, learn new procedures and work with new technology
- Team player and positive attitude

Continuous Improvement

- Ability to work to and support a culture of continuous improvement
- Commitment to delivering a high-quality service and high standard of work
- Commitment to managing own learning and continuous professional development relevant to the role
- Willingness to work sustainably and consider new or improved ways of working to reduce our impact on the environment.
- Commitment to understanding and upholding the charitable aims of the Royal Ballet and Opera – securing the future of ballet, opera and music, ensuring broad access to the artforms and reaching communities via our learning and participation programmes.

Note: This Job Description reflects the current situation. It does not preclude change or development that might be required in the future.

