



CHRIST CHURCH
FURTHER PARTICULARS

Job title	Legacy and Planned Giving Manager
Location	Christ Church
Department	Development Office
Salary	University Scale Grade 7 (currently £36,024 - £44,263, with a discretionary range up to 48,350) pro -rata
Hours	26 hours per week 0.7 FTE
Contract type	Permanent
Responsible to	Deputy Development Director (Philanthropy)
Application deadline	Noon 22nd July 2024
Vacancy reference	HT24_LAPGM
Additional information	This is a full-time position that cannot be held concurrently with any other substantive post without the explicit permission of the Development Director. This post is subject to a six month probationary period

Role of Legacy and Planned Giving Manager

This is a new role created to support legacy fundraising at Christ Church.

The primary role of the post holder will be to establish and develop a professional approach to legacy generation and stewardship from the alumni and friends of Christ Church.

The post holder will assess the current status of legacy giving and develop appropriate plans to increase legacy giving, particularly from alumni in the UK and USA. This will include the creation of a legacy giving campaign within Christ Church's 500th anniversary campaign including promotional communications and materials. Development of appropriate plans and materials for USA-based alumni will be an important element of a future legacy campaign.

The post holder will create tailored stewardship and prospect cultivation plans where appropriate as agreed with the Development Director.

The post holder will assist in implementing these plans, ensuring that precise and accurate records are confidentially maintained for all contacts. The post holder will also support the college in implementing prospect cultivation plans and undertake personal visits with alumni that intend to leave a gift in their Will. In addition, they will take responsibility for maintaining and developing Christ Church's legacy circle, the 1546 Society.

They will provide sensitive but practical support, helping alumni to make a legacy pledge and provide accurate information as to how to do this legally and effectively. This is a specialist role that requires a sound understanding of legacy fundraising and marketing.

The post holder will have excellent project management skills and will be able to prioritise their own workload. They will also possess outstanding communication skills and interpersonal skills.

The successful candidate will recognise and embrace the value of adopting a collaborative and internally transparent approach to fundraising within the collegiate University structure.

The postholder will be expected to work in Oxford at least one day a week. The postholder will be expected to travel within the UK and potentially to the USA.



Department information

Christ Church has a large and thriving alumni base of more than 9,000 members. Major resources have been invested in development activities since the mid-1990s, with important results for the institution's long-term financial security and ability to invest in its students. As the 500th anniversary in 2025 approaches, Christ Church remains committed to widening access through outreach activities, increasing student financial support, sustaining the tutorial system, preserving historic buildings, and attracting world-class scholars. The Development Office plays a crucial role in raising funds in support of those important priorities.

Christ Church

Christ Church is one of the largest of the Oxford colleges and has evolved over five centuries. Its junior members, both undergraduate (over 400) and graduate students (over 200), cover almost all the major academic disciplines in the Sciences, Humanities and Social Sciences, as do its senior academic staff (around 60). It aims at academic excellence and individual fulfilment in a friendly, tolerant and mutually supportive environment. The head of Christ Church is the Dean, while the College's academic functions are overseen by the Senior Censor. More general information about the College may be obtained at www.chch.ox.ac.uk.

Christ Church provides all our staff with a welcoming and inclusive workplace that enables everyone to develop and to do their best work. Join us and you will find a friendly, vibrant, democratic, and international community, with a great range of staff benefits.

Main Duties and Responsibilities:

The main duties of this post will be as follows:

- To work closely with the Development Director and Deputy Development Director (Philanthropy) to design and implement a legacy campaign.
- To identify alumni from whom the college might solicit legacy gifts. The post holder may also advise on segmentation and targeting strategies.
- To visit alumni independently to discuss legacy giving and to secure legacy pledges.
- To use judgement to identify when other members of the team or Governing Body should be involved in discussions with potential legacy givers and when others are best placed to make an ask.
- To work with the Development Director and Deputy Development Director (Philanthropy) to design appropriate proposals for individual prospective legacy donors.
- To work with the Development Director and Deputy Development Director (Philanthropy) to develop a plan for increasing legacy giving/planned giving from US-based alumni.
- To create legacy communication plans and materials for Christ Church and work with the Communications Officer on their delivery.
- To be a strong, well-informed advocate for legacy giving who can talk knowledgeably and persuasively about the impact legacy giving has on a college, and the difference that legacies have made.
- To provide information about the practicalities of making a Will to anyone in the UK who is considering leaving a legacy including technical legacy matters such as tax-efficient legacy giving.
- To provide information about planned giving to anyone in the USA considering leaving a legacy.
- To be responsible for formulating, together with the Development Director, stewardship plans including events and recognition
- To help process any legacy income, such as administering estates.
- To ensure that an up-to-date and accurate record of all legacy development activity for which the post holder is responsible are added to the database.
- To produce regular financial and non-financial activity reports and forecasts for the Development Director and relevant committees.
- To travel within the UK and potentially to the US for individual meetings.
- To develop and implement appropriate due diligence standards and strategies for legacy pledges, and to ensure all gifts comply with the University's standards on ethics and scrutiny.



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- To maintain an up-to-date knowledge and share information with college teams on legal and regulatory changes including Data Protection legislation, the Charity Commission and the Institute of Fundraising guidelines as relevant to legacy giving.
- To deliver training as required to college teams to allow them to embed effective legacy solicitation in their core development activities.
- To perform any other duties which are requested by the line manager and are commensurate with the grade of this post.

Selection criteria

Essential selection criteria

- An excellent general level of education to degree level or equivalent
- Proven experience of legacy marketing and appeals
- Experience of creating content for fundraising and stewardship materials
- Broad understanding of charity law and knowledge of relevant Probate and Trust Law and procedures
- Confidence and ability to be able to provide legacy information and training to development professionals
- Experience of legacy fundraising or major gift fundraising
- A combination of the personal sensitivity, maturity of approach and determination that is needed when working with senior academics and prospective major donors
- Excellent organisational and project management skills
- Excellent personal presentation and communication skills, both oral and written
- The ability to work productively with team members to deliver agreed outcomes
- The ability to converse effectively and convincingly with a range of people, including major donors, academics, and senior officers, and to represent the college at a senior level
- The ability to always work sensitively and with empathy
- The ability to multi-task and to prioritise own workload
- Working knowledge of data protection legislation including the General Data Protection Act 2018 and the PECR regulations
- Relevant IT skills including the use of Microsoft software packages, databases and web browsers
- Advisory experience and training delivery in small team settings
- A broad overview of estate administration and financial literacy.

Desirable

- Institute of Legacy Management Certificate CICLA (Certificate in Charity Legacy Administration), STEP (Society of Trust and Estate Practitioners) qualification or equivalent
- An interest in higher education and in particular an understanding of the collegiate University and its goals in teaching and research.

Pre-employment screening

Standard checks: If you are offered the post, the offer will be subject to standard pre-employment checks. You will be asked to provide proof of your right to work in the UK; proof of your identity; and (if we haven't done so already) we will contact the referees you have nominated. You will also be asked to complete a health declaration so that you can tell us about any health conditions or disabilities for which you may need us to make appropriate adjustments. For some posts, such as those involving 'regulated activities' with children and other vulnerable groups in the course of normal duties, a Disclosure and Barring Service (DBS) check will also be required.

Terms and conditions

- Salary: will be within the University Scale Grade 7 (currently £36,024 - £44,263, with a discretionary range up to 48,350) pro rata according to experience.
- Working hours: 26 hours per week. The normal working week is Monday to Friday. The post-holder will also need to have a flexible approach to working hours, as additional hours during weekends and evenings may be required at certain points of the year. The postholder will be expected to work in



Oxford at least one day a week. The postholder will be expected to travel within the UK and potentially to the USA.

- A three month notice period.

Employee benefits

- Christ Church employees enjoy five weeks paid holiday per calendar year rising to six weeks after two years' service. Time off in lieu will be given for Public Holidays which fall during term time.
- The post-holder will be entitled to lunches without charge when the kitchens are open.
- Generous pension scheme.
- Employee Assistance Programme alongside access dedicated support both within the college and wider University for your personal and career development.
- The opportunity for eligible staff to participate in tax-free bicycle hire/purchase salary sacrifice scheme.
- Season ticket loans
- Our range of other employee benefits and discounts also includes free entry to the Botanic Gardens and University colleges.

How to Apply

To apply for this position please complete provide the documentation listed below, no later than the deadline of **Noon 22 July 2024**. Applications received after this time will not be considered.

Application documents should include:

- A letter of application addressed to the Director of Development stating your interest in the role, and explaining how you meet the criteria set out above using examples of your skills and experience; and
- A CV, including the names and contact details of two referees. References will only be taken up for the successful candidate.
- Equal Opportunity Form

Applications should be emailed to recruitment@chch.ox.ac.uk

Applications will be judged only against the criteria which are set out in the job description, and applicants should ensure that their applications explain how they meet each of the selection criteria for the post using examples of their skills and experience. This may include experience gained in employment, education, or during career breaks (such as time out to care for dependants).

Christ Church is committed to fairness, consistency and transparency in selection decisions. Members of selection committees will be aware of the principles of equality of opportunity, fair selection and the risks of bias. Applications are particularly welcome from black and minority ethnic candidates, who are under-represented in College staff.

Christ Church welcomes applications from candidates who have a disability or long-term health condition and is committed to providing long term support. Please let us know if you need any adjustments to the recruitment process, including the provision of these documents in large print, audio or other formats. If we invite you for interviews, we will ask whether you require any particular arrangements at the interview.



Interviews

Interviews for the position are expected to take place on w/c **29th July 2024**.

If you need help

If you have any questions regarding the application process, please contact recruitment@chch.ox.ac.uk. All enquiries will be treated in strict confidence and will not form part of the selection decision.

Important information for candidates

Data Privacy

Please note that any personal data submitted to Christ Church as part of the job application process will be used only for the purposes of determining suitability for the post and processed in accordance with the General Data Protection Regulations (GDPR) and related UK data protection legislation. For further information, please see the Christ Church Privacy Notice available at: <https://www.chch.ox.ac.uk/privacy-policy>.

Due to the large volume of recruitment that Christ Church administers we are unable to provide feedback to non-shortlisted applicants.

Christ Church's policy on retirement

There is no normal or fixed age at which staff in non-academic posts have to retire. Staff at these grades may elect to retire in accordance with the rules of the applicable pension scheme, as may be amended from time to time.

Equality of opportunity

Christ Church is committed to equality of opportunity. It is our policy and practice that entry into employment and progression within employment will be determined only by criteria which are related to the duties of a particular post and the relevant salary scale. No applicant or member of staff will be treated less favourably than another because of their age, disability, ethnicity, marital or civil partnership status, parental status, religion or belief, sex, or sexual orientation.