Legacy & Planned Giving Manager
Linacre and Mansfield Colleges

January 2024

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<tr>
<th>Job title</th>
<th>Legacy &amp; Planned Giving Manager</th>
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<td>Colleges</td>
<td>Mansfield College and Linacre College</td>
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<tr>
<td>Department</td>
<td>Development teams</td>
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<tr>
<td>Location</td>
<td>Development offices at Mansfield College and Linacre College</td>
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<td></td>
<td>You may be able to agree a pattern of regular remote working with your line managers.</td>
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<tr>
<td>Grade and salary</td>
<td>Grade 7 £34,308 - £42,155 per annum</td>
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<td>Hours</td>
<td>Part-time (0.5FTE of 37.5 hours) in total, to be divided equally between the Colleges</td>
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<tr>
<td>Contract type</td>
<td>Fixed term – 12 months</td>
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<td>Reporting to</td>
<td>Head of Alumni Relations and Development, Linacre College Development Director, Mansfield College</td>
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<td>Benefits</td>
<td>Membership of the Oxford Staff Pension Scheme (USS). Free meals while on duty, 25 days annual leave plus 5 days Christmas closure; Salary sacrifice for childcare; Eye Care subsidy for DSE users; Employee assistance programme (EAP)</td>
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About Linacre College

Linacre College was established by the University in 1962 to provide a home for graduate students coming to Oxford to read for postgraduate degrees. The College accepts students for all full-time and many part-time post-graduate qualifications offered by the University. There are currently over 600 graduate students at Linacre, with approximately 350 studying for doctorates and the remainder taking post-graduate taught courses.

More than 70% of Linacre students are from outside the UK, representing over 80 different countries, and most have not studied in Oxford or the UK before. Linacre is a friendly and informal community that offers a mature environment suitable for postgraduate study. It has a single Common Room, shared by Fellows, staff and student members alike. The College currently has over
50 Governing Body Fellows. Most of these are Professors, Associate Professors and Lecturers in a wide range of subjects. Students are attracted to Linacre by its multidisciplinary and international character, and by the fact that it is strongly committed to reducing its impact on the environment. Linacre College welcomes diversity amongst its students, staff and visitors, recognising the contributions to the achievement of the College’s mission that can be made by people from a wide range of backgrounds and experiences.

**About Mansfield College**

Mansfield College is one of the 39 constituent colleges of the University of Oxford. It has around 250 undergraduates, 170 graduates and 30 visiting students. This relatively small size engenders friendly and close relationships not only among students and tutors, but across the whole community at the College.

Mansfield is one of Oxford University’s most open and forward-thinking Colleges. Proud of its non-conformist history – the College was founded to provide theological training for ‘dissenting’ ministers of the church – today the College is model for access to higher education, and exemplifies how social and intellectual diversity enriches an academic community.

We think Mansfield is everything an Oxford college should be in the twenty-first century: historic, beautiful, centrally located in the city, and a leading light on widening access to Oxford University. After two decades of pioneering outreach work, the College today has the highest intake of undergraduates from state-funded schools in the UK; from disadvantaged backgrounds; and one of the most diverse communities of all the Oxford colleges in terms of the social, educational and ethnic backgrounds of its students. At the same time as remaining true to its founding principles of freedom of conscience and educational access, the College is rightly proud of its strong academic results (top 5 of all the Oxford colleges in 2018/19).

The College is also home to the Bonavero Institute of Human Rights, within Oxford University’s Law Faculty, which was opened by the late Secretary-General of the United Nations, Kofi Annan, in 2018. The Institute is a perfect reflection of the spirit of the College: plural, broad-minded, and respectful of the dignity and worth of all.

Mansfield’s Principal, Helen Mountfield KC, is an internationally renowned human rights law specialist. As one of the UK’s leading equality law specialists, she has argued cases in the Supreme Court and European Court of Human Rights.

In 2021, Mansfield was recognised as a university College of Sanctuary by the UK charity City of Sanctuary, after demonstrating an ongoing commitment to nurturing a culture of inclusivity and awareness on campus for those seeking sanctuary (which includes refugees and asylum seekers), as well as in the wider community.

Detailed information about Mansfield College may be found at [www.mansfield.ox.ac.uk](http://www.mansfield.ox.ac.uk)
The role

This is a new role created to support two colleges within the University of Oxford – Linacre and Mansfield.

Key relationships: Development Directors at participating colleges; current and prospective legacy donors to these colleges; and colleagues in the University Development Office and the Alumni Office

Purpose: The primary role of the post holder will be to establish or develop a professional approach to legacy generation and stewardship from the alumni and friends of the colleges

The post holder will assess the current status of legacy giving in each college to create tailored legacy giving and marketing strategies. This may include the creation of a legacy giving campaign including promotional communications and materials. The post holder will create tailored stewardship and prospect cultivation plans where appropriate and agreed with each college Head of Development. 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 colleges 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 a legacy circle or society as desired at each college.

The post holder will divide their time equably between each college and will work flexibly as individual college needs demand. 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 when supporting multiple stakeholders. 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 located at individual college development offices. They may be able to agree a pattern of regular remote working with their line manager. The post will be based in Oxford, though the post holder can expect some UK travel. The line manager will regularly review progress.

The work of the Development teams within Colleges covers a wide range of activities and priorities which will inevitably change from day to day. All staff operate as a team, and, while each has their own responsibilities, they are expected to assist each other in peak periods. The post holder will need to become conversant with the University as a whole and especially with the numerous academic staff and volunteers.
Responsibilities

The duties of the post are set out as they are envisaged at present, but it will be important for the person appointed to be adaptable, and able to contribute to the development of the fundraising function of each College.

The main duties of this post will be as follows:

- To work closely with the Development Director in each participating college to design and implement a legacy solicitation campaign
- To provide advice to the Development Director in each college to identify alumni and friends from whom the colleges might solicit legacy gifts. The post holder may also advise on segmentation and targeting strategies
- To implement solicitation strategies to secure legacy gift pledges. To solicit legacy pledges personally when appropriate (as defined by the Head of Development in each College)
- To liaise with the Development Director at each college to determine what specific proposition should be put to a prospect, and under what terms, in order to secure the prospect’s greatest support
- To create, gain approval for, and implement legacy communication plans for each college
- 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 who is considering leaving a legacy including technical legacy matters such tax-efficient legacy giving
- To be responsible for formulating, together with the Development Director at each college, stewardship strategies including events and donor recognition. They will organise appropriate events for each legacy group each year
- 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 be maintained on the relevant databases including DARS.
- To produce regular financial and non-financial activity reports and forecasts for each Development Director
- 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
- 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 in order to allow them to embed effective legacy solicitation in their core development activities
- To carry out any other duties which are requested by the line manager and are commensurate with the grade of this post.
Selection criteria

Essential selection criteria

Experience and knowledge
- An excellent general level of education to degree level or equivalent
- Proven experience of legacy marketing and appeals
- Experience of creating fundraising and stewardship materials, such as brochures, letters, information sheets, and electronic communications
- Broad understanding of charity law and knowledge of relevant Probate and Trust Law and procedures

Skills and abilities
- Excellent organisational and project management skills
- Excellent personal presentation and communication skills, both oral and written.
- The ability to converse effectively and convincingly with a range of people, including major donors, academics and senior officers, and to represent the University and colleges at a senior level
- The ability to work sensitively and with empathy at all times
- 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

Attitudes
- Confidence and ability to be able to provide legacy advice and training to development professionals
- An interest in higher education and in particular an understanding of the collegiate University of Oxford, and its goals in teaching and research
- A combination of the personal sensitivity, maturity of approach and determination that is needed when working with senior academics and prospective major donors to the University

Desirable selection criteria
- Experience of legacy fundraising or major gift fundraising
- Advisory experience and training delivery in small team settings
- Institute of Legacy Management Certificate CICLA (Certificate in Charity Legacy Administration), STEP (Society of Trust and Estate Practitioners) qualification or equivalent
- A broad overview of estate administration and financial literacy
How to apply

If you would like to apply please submit a CV and a supporting statement to Mansfield HR vacancies@mansfield.ox.ac.uk

For enquires regarding the post please feel free to contact: humanresources@mansfield.ox.ac.uk

Your application will be judged solely on the basis of how you demonstrate that you meet the selection criteria stated in the job description.

As part of your application you will be asked to provide details of two referees and indicate whether we can contact them now.

In your supporting statement you may wish to explain how you meet each of the selection criteria for the post using examples of your skills and experience. This may include experience gained in employment, education, or during career breaks (such as time out to care for dependants)

We highly recommend uploading all documents as PDF files with your name and the document type in the filename.

If you need help

For general support enquiries on how to apply for the role, please email vacancies@mansfield.ox.ac.uk

Please note that correspondence on application progress will be via email. Please check your spam/junk mail if you do not receive an email.

Important information for candidates

Equal Opportunities

Mansfield College, Linacre College and the University of Oxford are equal opportunities employers and welcome applications from all suitably qualified candidates. We actively welcome diversity amongst our staff and students and all reasonable adjustments will be made to the recruitment process, working arrangements and/or environment to accommodate applicants with any form of disability. Applications are particularly welcome from Black, Asian, and Minority Ethnic candidates, who are currently under-represented in college posts at Mansfield. Please let us know if you believe there are any reasonable adjustments we should be making to assist you with your application. If you feel that you have a disability which may affect your application, please let us know.

Please also let us know of any reasonable adjustments that we would need to make for you to attend an interview.

To comply with UK employment legislation the successful candidate will be required to provide documentary evidence of his or her eligibility for employment before starting work with the College. Potential applicants should note that this advertisement does not satisfy the requirements of the UK Home Office in relation to a sponsorship for a visa.
Data Privacy
Please note that any personal data submitted to the College as part of the job application process will be processed in accordance with the GDPR and related UK data protection legislation. For further information, please see: GDPR Framework | Mansfield College, Oxford

Benefits of working at Mansfield and Linacre Colleges

Annual Leave
College employees enjoy a generous annual leave package of 25 days, pro rata in year of joining and per the hours worked in addition to the College closed period (5 days at Christmas) plus Bank Holidays.

Staff Meals
College employees can benefit from a free meal while on duty during normal operations. Mealtimes are always a welcoming opportunity to meet fellow staff. Some posts come with specific dining rights which will be outlined in the contract of employment main terms and conditions.

Pension Scheme
We operate a contributory pension scheme which you will be auto-enrolled into (subject to the conditions of the scheme). Further details will be provided on appointment. This post is pensionable in OSPS.

Family-friendly benefits
The College follows the University of Oxford’s family leave schemes. With one of the most generous family leave schemes in the Higher Education sector, and a range of flexible working options, Oxford aims to be a family-friendly employer. https://hr.admin.ox.ac.uk/family-leave/#/