



Candidate Pack

Role: Legacy Manager



British Heart
Foundation

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Appointment of Legacy Manager



Dear Candidate,

Thank you for your interest in our role of Legacy Manager at British Heart Foundation (BHF).

It is my privilege to lead the Marketing, Fundraising and Engagement team for one of the UK's largest charities and the biggest independent funder of research into cardiovascular disease in the UK.

Our vision is a world where everyone has a healthier heart for longer. A world where fewer hearts stop without warning and more of us can live well for longer with the people we love.

We know achieving this won't be easy. But thanks to decades of discovery and scientific advances – we are more confident than ever.

Together, we believe we can stop the devastation for the millions affected by these conditions. All it takes is passionate people like you standing alongside us and believing in the power of research to create a better, brighter, healthier world for everyone.

As Legacy Manager you will safeguard and maximise the British Heart Foundation's income from gifts in Wills by managing complex legacy casework, resolving legal and tax issues, and ensuring the charity receives its full entitlement while maintaining strong relationships with executors, solicitors and stakeholders. The role also leads a small team, contributes to legacy strategy and cross-organisational collaboration, provides specialist guidance internally and externally, and deputises for the Head of Legacy Management when required.

We want an exceptional colleague who exemplifies and champions our values; brave, informed, compassionate and driven. It's an incredibly exciting time to be part of our team. We are more ambitious and determined than ever – because the potential cures and treatments we need are in sight. You could be part of getting us there sooner, so thank you for your interest.

BHF is also proud that we are working towards being a truly diverse organisation, with an Equality, Diversity and Inclusion (EDI) strategy setting out a roadmap of changes we want to see. Our growing commitment to equality, diversity and inclusion spans across our organisation and we pride ourselves on being an inclusive employer who puts diversity at the heart of everything that we do.

So, if you feel you have the skills and experience that we are looking for, and you share our determination to help fund lifesaving research, then we would be delighted to hear from you.

Claire Sadler
Chief Marketing and Fundraising Officer



About us

If you had a heart condition in the early 1960s, your chances of survival were slim. At that time, cardiovascular disease caused more than half of all deaths in the UK, and 7 out of 10 people who had a heart attack in the UK died.

It was clear that something had to change, and fast. So, a group of cardiologists formed British Heart Foundation (BHF) in 1961 and set out to find lifesaving answers through science and provide health information and support to those who need it most.

Since then, research we've funded has been at the forefront of scientific progress across the globe. We've helped transform treatments for heart attack, helped to restart hearts with the development of portable defibrillators and proved that statins can save lives, offering hope to those who desperately need it.

These are incredible achievements and a testament to the passion of the researchers we fund and BHF staff, volunteers, and supporters. Thanks in part to these breakthroughs and many others, the number of people dying from cardiovascular disease each year in the UK has nearly halved since BHF was set up. But our work is far from over.

Despite the strides we've made, cardiovascular disease remains the world's biggest killer. In the UK alone, 1 in 4 of us

die from them. It affects people of all ages and can stop hearts unexpectedly – leaving gaping holes in families and futures in tatters. This is why our research is still needed.

Hearts are precious. We write from them. Sing from them. Follow our dreams with them. And while we understand more about them today than we did seven decades ago, there is still so much left to discover. BHF can't tackle these conditions alone. The only way we can rise to some of the biggest challenges in cardiovascular medicine and save more lives is by continuing to fund scientific research.

Our vision is a world where everyone has a healthier heart for longer. Where fewer hearts stop without warning and more of us can live well with the people we love.

We know achieving this won't be easy. But thanks to decades of discovery and scientific advances, we are more confident than ever. Together, we want to stop the devastation for the millions affected by cardiovascular disease. All it takes is passionate people like you and believing in the power of research to create a better, brighter, healthier world for everyone.

“CPR and heart surgery saved my life when I was six. Research made that happen.”

Jadyn Briggs



Being a responsible charity



Every year we make further progress to being a more sustainable, fairer and well-governed charity.

We raise money to fund research to find cures and develop treatments for the world's biggest killers. And we are determined to do this in a responsible way.

When it comes to environmental factors, links to cardiovascular disease are clear. Research shows that people living with cardiovascular disease are more likely to be negatively impacted by extreme weather such as intense heat and cold.

We're also committed to making BHF as sustainable as possible throughout its operations. This includes a commitment to reducing avoidable waste, and reducing our carbon footprint with a commitment to be a net zero organisation by 2045, at the latest.

This covers all areas of our activities, from direct emissions, such as the heating we use in our BHF offices and stores, to the much more significant indirect emissions from within our supply chain through to how the research we fund is undertaken.

Our sustainability targets are ambitious and have been designed in accordance with the Greenhouse Gas Protocol and the Science Based Targets Initiative (SBTi). Our roadmap to net zero has six focus areas.

- energy efficient and zero emission buildings
- zero emissions transport
- product sourcing and suppliers
- travel and logistics
- waste and circular economy
- responsible research funding.

BHF remains dedicated to investing our funds responsibly, in line with our mission and values.

Sometimes the research we fund may involve animals; this isn't something we take lightly and you can read more about our commitments in research on our website.



Our strategy

Our strategy sets out how we aim to save and improve lives on a scale more ambitious than ever before.

Our vision is a world where everyone has a healthier heart for longer. We'll get closer to that day by focusing on three goals:

- We will stop heart disease before it starts, by revolutionising how we prevent it
- We will save more lives from heart disease by discovering groundbreaking treatments and cures
- We will support everyone with heart disease to live a longer, healthier life.



Lifesaving research



Advance

Advance the scale, breadth and impact of cardiovascular research



At the heart of our strategy is continuing to fund the best minds and the brightest ideas to advance our understanding of all cardiovascular diseases and to develop the diagnostics, treatments and cures of the future.

However, the world is rapidly changing and we need to evolve our approach to make the biggest impact. We will expand the scope of our funding to capitalise on emerging opportunities in areas like artificial intelligence, data science and genomics. And we will strategically invest in areas of unmet need, to make transformational breakthroughs with the potential to save and improve countless lives.

Furthermore, while continuing to fund the very best discovery science, we will increase our focus on translating more of our discoveries into groundbreaking ways to prevent, diagnose and treat cardiovascular disease.

Our objectives:

- Grow the UK's investment in cardiovascular research, helping to close the UK's funding shortfall in research to tackle cardiovascular diseases.
- Grow the strength, breadth, and diversity of the UK's cardiovascular research workforce, enabling it to power the discoveries of the future.
- Increase BHF's investment in prevention research, innovation, and partnerships to stop heart disease before it starts.
- Increase BHF's investment in strategic funding initiatives and Grand Challenges to discover the diagnostics, treatments and cures of the future.
- Significantly grow BHF's investment in clinical and translational research, leading to faster translation of scientific discoveries towards patient benefit.

Health and care



Transform

Transform the information, care and support available to all people affected by heart conditions



Funding cutting-edge research and innovation is the beating heart of BHF. But we need to turn the knowledge this research generates into improvements in care, into the information and support that helps people manage their conditions, and into transformational influencing campaigns that save and improve lives.

With our health systems in crisis and heart health inequalities widening, our work in these areas has never been more needed. In our strategy, we set out to reach more people with this vital work.

We will increase our investment in innovations that have the potential to transform heart care. We will make our health information and support available to millions more people when they need it most. And we will continue in our mission to create a Nation of Lifesavers, trained in CPR and able to access a defibrillator in the ultimate medical emergency.

Our objectives:

- Grow the scale and scope of BHF's healthcare innovation funding, leading to pioneering models of care being rolled out across the NHS.
- Make BHF's information and support available to every family in need, at the point of need.
- Grow the number of people trained in CPR and able to access a defibrillator, contributing to an improvement in out-of-hospital cardiac arrest survival rates.
- Influence the Governments and health services in all four nations to prioritise tackling cardiovascular disease and reduce health inequalities.

Support and income



Inspire

Inspire more support and income to power lifesaving research



The scientific breakthroughs that have saved and improved countless lives over the last 60 years have been powered by the generosity of our incredible supporters, partners, volunteers and customers.

From taking on marathons in memory of a loved one, to donating their unwanted sofas, these remarkable acts of kindness fuel lifesaving progress. But the world is rapidly changing. And we need to evolve with it to raise the funds necessary to fuel our ambitions.

In our strategy, we commit to growing our fundraising income by building lifelong relationships with our supporters and building partnerships with high-value philanthropic donors and corporate organisations who share our passion for supporting lifesaving discoveries.

Furthermore, we will strengthen our position as the UK's leading charity retailer, both online and in people's communities.

Our objectives:

- Raise the profile of cardiovascular disease as the world's biggest killer.
- Grow our fundraising income by expanding our supporter base and the value of their support.
- Strengthen our position as the UK's leading charity retailer, by evolving our offer in response to changing market conditions and customer demands.
- Transform our organisation to be truly customer-centric in everything it does.

Accelerating our impact

Accelerate

Accelerate impact by unlocking the potential of our people, technology and culture



Over the last 60 years, we've made incredible progress. But we know we can go faster and make an even bigger impact. Three priorities will give us the tools to accelerate progress in every area of our work.

Our brilliant team of colleagues and volunteers will continue to be the heartbeat of what we do. But we will harness the power of our people, by increasing the diversity of our workforce and investing in the skills to make us fit for the future.

We will seek to utilise cutting-edge technologies to enhance the efficiency and impact of everything we do – from the life-changing research we fund to the personalised experiences we offer our generous supporters.

And we will continue to commit to being an agile, well-governed and financially sustainable charity – making the best use of every pound entrusted to us.

Our objectives:

- Build, develop and empower a talented and diverse team to deliver BHF's mission.
- Transform our technology foundations, harnessing data and AI to significantly improve our security, income, customer focus and impact.
- Lead the charity sector in creating a sustainable, fair and well-governed BHF with equality, diversity and inclusion at the centre of everything we do.
- Create a culture of excellence where we consistently look for ways to learn, innovate and continuously improve.

Belonging

Our push for equality, diversity and inclusion takes many forms, including how we manage our organisation, and how our research funding helps to tackle health inequalities.

An important starting point is making sure BHF's workforce reflects the general population so we can better represent the experiences and voices of the communities we support. A more diverse, inclusive, and fair BHF will not only improve the quality of what we do, but the impact we have.

The ongoing work of our Health Inequalities and Research Inequalities working groups demonstrate our commitments to improve EDI beyond our own workforce, and into the wider healthcare systems and research ecosystems we work so closely with

We want all of our BHF colleagues to have development and progression opportunities, and to embed a more inclusive culture throughout our organisation. Our EDI strategy sets out our roadmap of the changes we want to see.

We have a number of affinity groups within the organisation. These include spaces for working parents, individuals from different religious, racial, and ethnic backgrounds, members of the LGBTQIA+ community and those with disabilities and long term health conditions. These are designed to be spaces for colleagues to feel connected, included and heard.

Colleagues frequently organise internal events to foster a sense of belonging, often led by one of our Affinity Groups which serve as a focal point for colleagues with shared interests to come together. For example, we enjoyed a fantastic and joy-filled celebration of Diwali at both our London and Birmingham offices.

We want to fund lifesaving research for everyone. We can help to achieve this by welcoming colleagues from all backgrounds to come and be part of our BHF family.



Building an inclusive and supportive environment

We recognise the importance of ensuring BHF offers an environment that allows all our colleagues and volunteers to thrive. Our equality, diversity and inclusion (EDI) strategy, continues to deliver positive improvements to ensure this is the case.

Whilst working at BHF, we actively encourage our colleagues to feel safe to bring their true selves to work. We strive to create a culture where colleagues are inquisitive about diversity and keen to get involved in all activities which make individuality and inclusivity part of what we do every single day.

Improving diversity in research

Making the world a fairer place is an important goal, one that we are proud to contribute to by tackling inequalities in cardiovascular health, improving the diversity of our research workforce, and making BHF a more inclusive place to work.

We want to have achieved greater inclusivity in the funding and the design of research, as well as in the cardiovascular research community. We have focused on collating data that defines our starting point, so we can take the right action to improve diversity.

We've published our first research funding diversity report. The report provided valuable insight that is helping us shape our future actions to address under-representation in our research community.

Staff engagement

Every year we reinforce our EDI commitment through a colleague engagement survey, to help us understand how we can continue to improve.



One of the most important questions is whether BHF has created an environment where people of diverse backgrounds can succeed. Last year, 2023-24, we were at 86% and set a target score of 90% for January 2025 which we are pleased to say we achieved this year!

Enhancing our benefits

We aim to empower and support the health and wellbeing of everyone who works at BHF, and so we continually review our staff benefits to ensure they are fair and attractive both to current and potential employees.

We've recently added a holistic and flexible Support Leave provision for everyone. This provides extra paid time off to support colleagues or others close to them during a life event.

Celebrating Pride

Pride is a chance for us to learn and show support for the LGBTQIA+ community. BHF colleagues have taken part in Pride events across the country since 2018, including Pride marches in Edinburgh, Cardiff, Belfast and London.

Wellbeing

We take immense pride in fostering an environment that prioritises the health, safety, and wellbeing of our employees, volunteers, and customers. Our excellence in health, safety and wellbeing is about cultivating a culture where every individual feels valued and safe.

One of our standout initiatives is the Live Well Work Well project group, which plays a pivotal role in enhancing workplace wellbeing. This group organises a myriad of activities and resources aimed at promoting and supporting mental, physical, social and financial health.

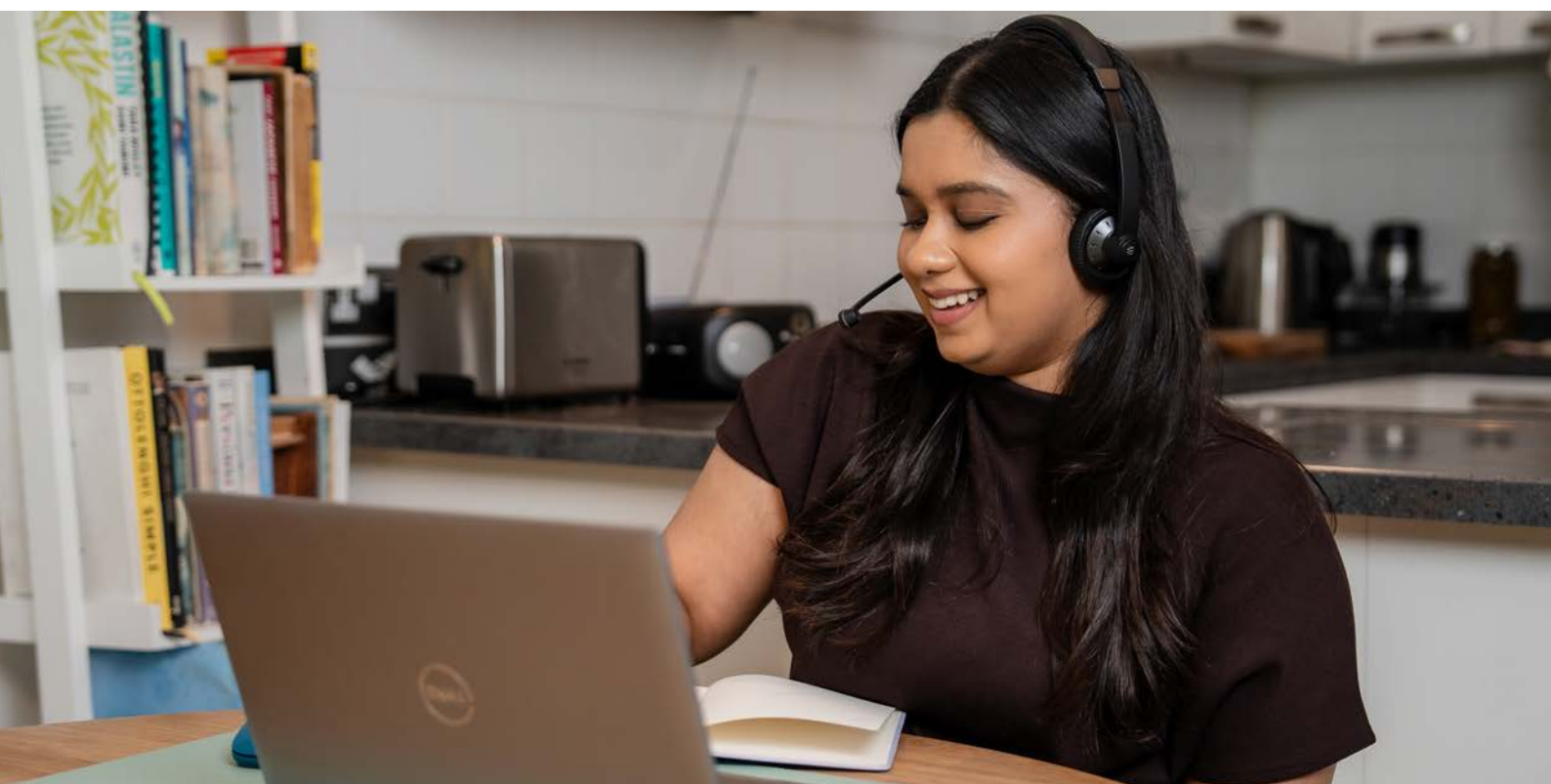
At BHF, we believe that a safe and healthy workplace is the foundation of success. As we continue to innovate and grow, our commitment to health, safety, and wellbeing remains unwavering. Join us and be a part of an organisation that not only values your professional contributions but also cares deeply about your overall wellbeing.

A flexibly connected organisation

Our flexibly connected programme allows colleagues to work flexibly, in a way that helps unlock their best work for the cause.

The programme has been engaging with our Champions network, gathering insights from colleagues through our Ways of Working Study, to continuously adapt the approach where needed. It was awarded the Best Flexible Working Strategy at the HR Excellence Awards.

Join us at BHF and be part of a team that truly cares about your wellbeing. Together, we can make work to a world where everyone has a healthier heart for longer, while supporting each other every step of the way.



Our People Power

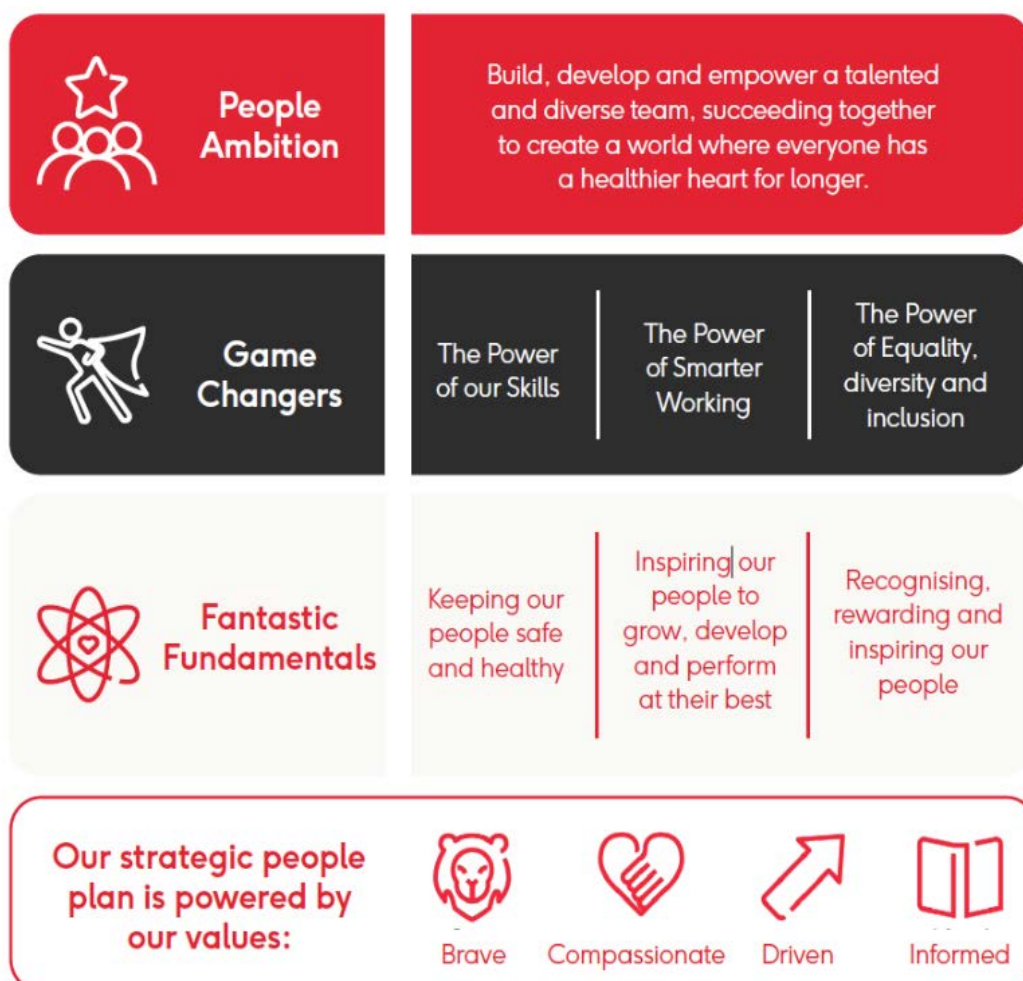


Our vision is a world where everyone has a healthier heart for longer, but we can't get there without our brilliant colleagues and volunteers.

At the heart of Our People Power sits our central people ambition, through which we will drive performance to further progress and accelerate BHF's lifesaving work, leveraging the unique talents and skills of our people.

We will power up our people to bring their best every day, providing a brilliant work experience, continuing to make BHF a great place to work. Through inspiring, empowering and enabling our people, whatever their role and background, we will collectively power towards our vision as a world where everyone has a healthier heart for longer.

To achieve our strategic aims, we need everyone pulling in the same direction. Our people ambition unites us all, bringing all our people (colleagues and volunteers) together to play their part in creating a world where everyone has a healthier heart for longer.



Our values

We are proud that the work we do is funding groundbreaking, lifesaving research. Our vision is a world in which everyone has a healthier heart for longer.

That's why our values are key to defining who we are, how we do things and how we can achieve our ambitions so that every pound we raise funds the research that keeps millions of hearts beating.



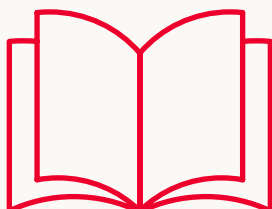
Brave

We speak out.
We're decisive.
We're innovative.



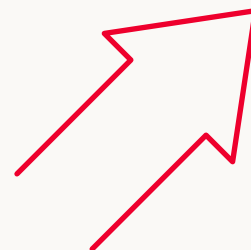
Compassionate

We're open and honest.
We respect others.
We care.



Informed

We're clear.
We're open minded.
We work together.



Driven

We're focused.
We're determined.
We keep learning.

Our benefits

We all achieve more together when we're happy and healthy. As a world class organisation, we offer competitive salaries and an attractive package of benefits, designed to support the health and wellbeing of everyone who works here. Our generous benefits include:



Annual leave

Our annual leave allowance of 30 days plus bank holidays is among the best in the sector.



Health care

We offer employees private healthcare, dental health cover and a contribution towards your gym membership.



Family care

We offer 12-weeks' pay for all family leave including maternity, paternity, adoption and neonatal care leave and are committed to offering returning parents and guardians the opportunity to work flexibly.



Live well. Work well.

Heart health is central to our mission, and that starts with you. We provide a programme of activities, opportunities and guidance to inspire and support you to live a healthy and happy life, at home and at work.



Support leave

We offer a holistic support leave of up to 10 days leave to support colleagues in time of uncertainty, where you may need to take additional time away from work to support yourself or others during a life event, such as caring.



Pensions

Our generous pension scheme will support you to save for your retirement. You can contribute a minimum of 3% but can increase this to 8% or more, with employer contribution starting at 5% and increasing to a maximum of 10%.

Job description



Job title	Legacy Manager		
Directorate	Marketing, Fundraising and Engagement		
Team	Legacy Management		
Reporting to	Head of Legacy Management		
Agility contract type	Blended (home and office)	No of direct reports	3
Location	Dual – London Office (NW1 7AW) and Home		
Budget responsibility	N/A		
Job level	4	Date	Jan 26

Role Summary

The Legacy Management Team works to manage, protect and optimise the c. £100m left to the British Heart Foundation (BHF) in supporters Wills each year. This role will, alongside the other three Legacy Managers, support the Head of Legacy Management to build on the team's successes and optimise the BHF's income from gifts in Wills.

This role will undertake a variety of work including managing casework in accordance with the law, best practice and BHF's processes and procedures, delivering strategic projects, collaborating with internal and external stakeholders, providing technical guidance to colleagues and potential legacy givers and line managing two Assistant Legacy Officers and one Legacy Administrator. This role may also require deputising for the Head of Legacy Management.

Key responsibilities



Legacy Management

- Manage a caseload of legacies bequeathed to the BHF
- Ensure that the BHF's full entitlement to legacies is received by identifying all reasonable opportunities to maximise the value of the BHF's bequests and take appropriate steps to realise this value without unnecessarily damaging the ability of the BHF to fundraise in the future, by:
 - » proactive involvement in property and other asset sales
 - » proactive involvement in probate disputes affecting our entitlement
 - » ensuring that the tax concessions available to charities have been correctly received, including ensuring that our inheritance exemption is correctly applied, that our capital gains tax exemption is utilised where viable to do so, and obtaining tax deduction certificates in respect of income tax paid during the administration
 - » checking Wills and Estate Accounts
 - » including in all of the above, liaising as necessary with other charity beneficiaries
- Make strategic decisions about:
 - » contentious matters
 - » whether to refer ex-gratia requests for approval by our Trustees
 - » matters requiring decisions of principle
 - » unusual matters or those where there is perceived to be a particular risk of adverse PR
 - » in all matters consulting with the Head of Legacy Management and Directors in accordance with agreed criteria
- Present a favourable and helpful image of the BHF to outside contacts such as solicitors, trust corporations and the public

Legacy Marketing and Strategy

- Work with and assist Legacy Engagement colleagues in promoting legacies and support them in the delivery of the Legacy Engagement strategy
- Work on and help deliver the Legacy Management strategy and strive to provide an excellent legacy administration experience.

Leadership and Management

- Lead and manage members of the department as required, including ensuring that they are trained to an appropriate level in all relevant legal, technical and practical matters
- Set and monitor objectives in line with overall departmental targets and build personal development plans to nurture and develop talent
- Produce legacy statistics and casework reports as required
- Offer guidance by telephone and in correspondence to individuals and solicitors seeking specific advice on leaving a bequest to the BHF
- Deputise, whether on a short – or long-term basis, in the absence of the Head of Legacy Management with guidance from the Head of Legacy Management as to any current priorities, and within any pre-agreed limits to this authority and to any arranged division of this work between Legacy Managers (if there is more than one)
- Be a part of the Legacy Management team, leading by example and showcasing our values and behaviours

Key responsibilities



General

- Keep up to date with sector developments and knowledge of this area, implementing any learnings as necessary
- Any project work or other duties as requested by the Head of Legacy Management and Director of Innovation, Product Development and Delivery
- Forge excellent relationships across all areas of BHF to identify cross divisional opportunities to collaborate where appropriate
- Commitment to raising the profile of legacies within the organisation
- Adhere to the values, strategy and objectives of the BHF

Knowledge, training and qualifications



- Extensive experience in legacy management within the charities legacy sector; or Qualified Private Client Solicitor; or Qualified member of the Society of Trust and Estates Practitioners; or Qualified Chartered Legal Executive with experience of Wills and Probate

Experience

- Proven experience of working within private client/legacy management
- Line management experience and can demonstrate first class leadership skills in your work with a compelling vision and the ability to inspire others and motivate and develop a team of staff
- Experience of delivering a strategy, demonstrating strategic thinking and strong influencing skills
- Proven experience of prioritising workload and the ability to ensure it is delivered on time

Skills and attributes



- A proven leader who thrives on the opportunity to work in an ambitious and passionate team
- Excellent spoken and written communication skills
- Strong presentation skills
- Strong interpersonal skills, along with the ability to develop solid working relationships with supporters and executors as well as internal stakeholders
- Strategic thinker with excellent knowledge of the sector
- A self-starter who motivates themselves and those around them
- Ability to communicate complex issues clearly and succinctly
- High degree of financial numeracy
- Meticulous attention to detail
- Strong IT skills including a high degree of competence using Microsoft Office
- High level of empathy
- Believes in the work of the BHF and willingness to embed BHF's values across their work
- Willingness to learn, develop and share ideas
- Ability to manage a demanding and varied workload and make decisions on the most complex of legacies (guidance and supervision from Head of Legacy Management)
- Experience of using First Class 4 (desirable but not essential)

Safeguarding

At British Heart Foundation (BHF), we are committed to creating a safe and rewarding environment for all of our people to work and volunteer. This means we have a robust safeguarding policy to ensure everyone is treated properly, and a whistle blowing service so people can raise any concerns they have confidentially.

Data protection

During your employment, this role will encounter some personal data. The role will be permitted to access and use the following types of personal data:

- Personal details, contact information and/or family details
- Personal financial information - including any of the following - donations, gifts, bank account, card numbers
- Personal Sensitive data - including any of the following - health, race, ethnicity, sexual orientation, political affiliation, trade union membership, religious or philosophical beliefs, biometric or genetic data, criminal record

If you find yourself with access to personal data you are not authorised to have, you must report it to your line manager and the IT Service Desk immediately.

During your employment this role will not encounter any personal data. If you find yourself with access to personal data you are not authorised to have, you must report it to your line manager and the IT Service Desk immediately.

How to apply



To apply for this role please use the apply button via the jobs page on our website. Our process involves submitting your CV and a supporting statement, which should outline your interest and explain how you meet the criteria stated in the person specification. You may also be asked a few application questions, depending on the role you're applying to.

All applications are managed by our Recruitment team. If you wish to speak with a member of the team regarding the role and your application please contact us on careers@bhf.org.uk

Should you need any adjustments to the recruitment process at application stage please contact the Recruitment team on careers@bhf.org.uk





**British Heart
Foundation**