

## Job Description

**Job Title:** Legacy and In Memory Officer

**Responsible to:** Legacy and In Memory Manager

### Job Purpose:

Responsible for developing and implementing a marketing programme to grow and maximise gifts in wills and in memory/tribute fund giving. This role will work closely with other teams including events, community and individual giving to identify opportunities and touch points to promote legacy and in memory giving to supporters who are touched by and deeply engaged with Acorns.

### Main Duties:

#### Legacy Marketing (Gifts in Wills)

- > Support the delivery of a multi-channel legacy marketing programme to increase awareness, consideration, and pledges of gifts in wills to recruit and retain a pool of legacy prospects and pledgers to maximise future legacy income.
- > Manage the Free Wills Service and plan opportunities to promote it to acquire prospective legacy pledgers and intenders.
- > Act as the web page guardian for Gifts in Wills and update content when needed.
- > Collaborate with the Donor Experience team to create compelling storytelling materials—brochures, case studies, videos, web content—to highlight the importance of gifts in wills.
- > Steward legacy prospects and pledgers through engaging journeys and impact reports.
- > Monitor and maintain reports that set out performance against KPIs, legacy pipeline and year on year performance as well as environmental factors which could enhance or impact on the programme.
- > Be the first point of contact and knowledge on legacy and in memory matters with staff and supporters, responding to queries with printed material and/or verbal advice
- > Keep up to date with new developments, legalities, codes of conduct, best practice and trends within this area of fundraising and the legacy sector, using this to inform the ongoing development of Legacy and In Memory operational planning.

#### In Memory Giving

- > Support the delivery of campaigns that encourage supporters to give in memory, including tribute funds, memorial events,
- > Lead on the delivery and monitoring of effective supporter journeys for in memory pledgers.
- > Support with the delivery of in memory stewardship events.
- > Act as the web page guardian for In Memory Giving and update content when needed.

#### Data, Insight & Performance

- > Use data, insights, and supporter feedback to refine legacy and in-memory audience segments, messaging, and journeys.

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- > Lead on campaign reporting, sharing successes and learnings with colleagues in fundraising
  - > Maintain accurate records of legacy pledgers and in-memory supporters in Donorfy and First Class.
  - > Create case files for all new notifications received via Smee & Ford and direct notifications, make contact with executors as appropriate and make a record of all details on the CRM

### Budget management

- > Monitor and maintain legacy and in memory expenditure and income, ensuring that activities are delivered to budget.
- > Support Legacy and In Memory Manager with developing annual operational plans and budgets for the Legacy and In Memory programme.

### Infection Prevention and Control

All Employees and Volunteers of Acorns will be expected to follow all infection prevention and control policies and procedures to ensure a safe and healthy environment. This includes maintaining best hygiene practices, using personal protective equipment (PPE) as required, and adhering to safety protocols to minimise the risk of infection. It everybody's responsibility to promote a clean and safe environment for staff, children, young people and their families.

### Health and Safety

All Employees and Volunteers of Acorns are required to comply with all health and safety policies and procedures in accordance with the Health and Safety at Work Act 1974. This includes taking reasonable care of their own health and safety, as well as that of others who may be affected by their actions. The role involves using personal protective equipment (PPE) when necessary, following established safety protocols, reporting hazards or unsafe conditions, and participating in health and safety training. All Employees and Volunteers of Acorns must actively contribute to maintaining a safe and healthy environment and cooperate with the employer to ensure compliance with relevant health and safety legislation.

### Environmental sustainability

All Employees and Volunteers of Acorns are required to support in minimising environmental impact wherever possible, including recycling, switching off lights, computers, monitors and equipment when not in use. Helping to reduce paper waste by minimising printing/copying and reducing water usage, reporting faults and heating/cooling concerns promptly and minimising travel. Where the role includes the ordering and use of supplies or equipment the post holder will consider the environmental impact of purchases.

### Safeguarding

Acorns is committed to safeguarding and promoting the welfare of children and adults and expects all staff and volunteers to share this commitment. It is the responsibility of all staff to always safeguard and protect children and adults at risk, staff must report any concerns as per safeguarding policies and procedures which are available on Acorns internal systems. Every staff member must undertake regular mandatory safeguarding training at a level relevant to their role.



### Data Protection and Confidentiality



All Employees and Volunteers of Acorns are required to comply with all relevant data protection laws, including the Data Protection Act 2018 and the General Data Protection Regulation (GDPR). This includes ensuring the confidentiality, integrity, and security of personal and sensitive information. All Employees and Volunteers of Acorns must handle all data in accordance with organisational policies and procedures, ensuring it is only used for its intended purpose and is not disclosed to unauthorised individuals. The role may involve safeguarding personal data, reporting any data breaches, and always maintaining strict confidentiality to protect both individuals' privacy and the organisation's legal obligations.

### Equality, Inclusivity and Diversity

All Employees and Volunteers of Acorns are required to promote and uphold the principles of equality, inclusivity, and diversity in all aspects of their work. This includes ensuring that all individuals are treated with respect and fairness, regardless of their race, gender, age, disability, sexual orientation, religion, or any other characteristic protected by law. All Employees and Volunteers of Acorns must comply with relevant legislation, including the Equality Act 2010, and contribute to creating an inclusive environment that values diverse perspectives. The role involves actively challenging discrimination and bias and supporting the organisation's commitment to providing equal opportunities for all.

### Other Duties:

- > Develop effective working relationships across the organisation, particularly with the hospices, care teams, family teams, care and fundraising volunteer departments, and retail managers.
- > To act as an ambassador for Acorns raising awareness of its charitable aims and objectives and enhancing its reputation through exemplary behaviour, conduct and team working.
- > To put the needs and interests of Acorns children and young people and their families first in all aspects of their work.
- > To ensure compliance with Acorns policies for diversity, employment, equal opportunities, health and safety, information governance and safeguarding.
- > To actively participate in a performance and development review process and any training and development identified to further enhance your role with Acorns.
- > To be innovative, commit to continuous learning, researching new ideas, monitoring new technology advancements, sharing good practice across the team and colleagues.
- > Promote a coaching culture within Acorns.
- > To carry out any other reasonable duty as requested by your line manager.

Acorns adheres to the United Nations Convention on the Rights of the Child. As an employee you will be a Duty Bearer for Children's Rights and support all children to be Rights Holders.

## Person Specification: Legacy and In Memory Officer

|                             | Essential  | Desirable   |
|-----------------------------|--|---|
| <b>Qualifications</b>       | <ul style="list-style-type: none"> <li>&gt; A good level of education and digital confidence and capability.</li> </ul>  | <ul style="list-style-type: none"> <li>&gt; Studying or completion of Fundraising, Marketing or similar professional qualifications such as Chartered Institute of Marketing, Chartered Institute of Fundraising.</li> </ul>  |
| <b>Experience</b>           | <ul style="list-style-type: none"> <li>&gt; Demonstrable experience of delivering a legacy and/or in-memory programme</li> <li>&gt; Experience of and resilience to meeting targets and KPIs.</li> <li>&gt; Project and budget management</li> <li>&gt; Working with data for marketing and analysis purposes</li> </ul>   | <ul style="list-style-type: none"> <li>&gt; Previous experience working within a Fundraising team.</li> <li>&gt; Experience of working with volunteers</li> <li>&gt; Track record of successfully managing and developing relationships with individual supporters, customers or clients.</li> </ul>  |
| <b>Knowledge</b>            | <ul style="list-style-type: none"> <li>&gt; Understanding of the principles of direct and relationship marketing.</li> <li>&gt; Understanding of legacy administration steps following receipt of a notification.</li> <li>&gt; Awareness of the Fundraising Code and how this relates to communications with vulnerable supporters</li> </ul>   | <ul style="list-style-type: none"> <li>&gt; Experience using Donorfy or a similar CRM database.</li> <li>&gt; Knowledge of CiCLA</li> <li>&gt; Experience of First Class software OR case administration/management, ideally within a charity legacy, trusts, or probate environment, with a focus on meticulous record-keeping and data integrity</li> </ul> |
| <b>Skills and Abilities</b> | <ul style="list-style-type: none"> <li>&gt; Ability to communicate effectively, empathetically, concisely and confidently on the telephone, in writing and in person when engaging executors and persons of the deceased donor.</li> <li>&gt; Ability to understand, interpret and present complex information and advice in a clear, succinct and appropriate way for a range of audiences.</li> <li>&gt; Planning &amp; budgeting skills.</li> <li>&gt; Project Management skills</li> <li>&gt; Ability to work independently and as part of a team.</li> <li>&gt; Ability to understand, exhibit and implement excellent customer care attitude and behaviour, therefore committed to building good internal and external relationships, both with staff and supporters.</li> </ul> | <ul style="list-style-type: none"> <li>&gt; Influencing and networking skills.</li> <li>&gt; Ability to write or help shape effective and engaging copy.</li> </ul>   |
| <b>Other</b>                | <ul style="list-style-type: none"> <li>&gt; Passionate and committed to Acorns mission and values</li> <li>&gt; Willingness to work outside agreed hours on a regular basis.</li> <li>&gt; A willingness and ability to travel independently throughout the organisation and to meetings, presentations, and events.</li> <li>&gt; Willingness to train and learn new skills.</li> </ul>   |   |
| <b>Behaviours</b>           | <ul style="list-style-type: none"> <li>&gt; Build collaborative relationships across the organisation, creating a culture of cross function working.</li> <li>&gt; Positive, enthusiastic approach &amp; can-do attitude.</li> <li>&gt; Curious, always seeking to understand and improve experience of customers.</li> <li>&gt; Open to change and continuous improvement.</li> <li>&gt; Innovative mindset and passionate about learning.</li> <li>&gt; Commitment to the Acorns strategy &amp; its success.</li> <li>&gt; Driven in your approach to strive for excellence and build lasting partnerships for Acorns.</li> </ul>  |   |



## Terms and Conditions of Employment

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| <b>Job Title:</b>      | Legacy and In Memory Officer   |
| <b>Responsible To:</b> | Legacy and In Memory Manager   |
| <b>Location:</b>       | Nearest Acorns Hospice (Birmingham, Walsall or Worcester)  |
| <b>Salary:</b>         | £31,110 per annum  |
| <b>Notice:</b>         | 8 weeks  |
| <b>Hours:</b>          | 37.5 hours per week  |
| <b>Holidays:</b>       | 27 days plus statutory bank holidays   |
| <b>Pension:</b>        | Contribution to Group Personal Pension Plan or NHS Pension Scheme (if already in scheme).            |
| <b>Life Assurance:</b> | Acorns Group Life Assurance Scheme or NHS Pension Scheme Life Assurance cover (if already in scheme) |

All terms and conditions will be detailed in writing together with Employee Handbook which must be read and observed.