

Job Description

Job Title: Legacy and In Memory Manager

Responsible to: Head of Public Fundraising

Direct Reports: Legacy and In Memory Officer

Job Purpose:

Responsible for managing and reporting on a legacy pipeline of circa £4m and to grow the In Memory Giving programme. This role will develop, deliver, and optimise strategies that inspire supporters to leave gifts in their wills and to give in memory of loved ones. This role combines strategic marketing, compassionate communication, and relationship management to grow long-term giving and strengthen supporter loyalty. To work closely with Individual Giving, Philanthropy and Community Fundraising to develop and implement marketing plans for legacy and in memory giving and be the champion for legacy and in memory giving across Acorns.

Main Duties:

Leadership

- > Provide strategic leadership, mentoring and development for the Legacy and In Memory Officer, ensuring a high-performing and motivated team.
- > Contribute as an active member of the wider Fundraising management team, supporting organisational initiatives and strategic goals.

Legacy Marketing (Gifts in Wills)

- > Develop and implement 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.
- > 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.
- > Work with Finance to ensure accurate administration and reporting of legacy gifts.
- > Manage the relationship with Foot Anstey to deliver legacy case management and ensure that case files are created for all new notifications, contacting executors as appropriate and recording on First Class and Donorfy.
- > Advocate and train non-fundraising staff (Care, Retail, & Volunteering) on the importance of legacy and in memory giving
- > Work with Foot Anstey to identify and escalate any contentious cases, making recommendations on a resolution whilst ensuring that Acorns best interests are always represented.
- > Develop a monthly report that sets out performance against KPIs, legacy pipeline and year on year performance as well as environmental factors which could enhance or impact on the programme.

- > Develop strong relationships with all relevant external stakeholders and audiences such as solicitors, executors, funeral directors, legacy enquirers and pledgers and with supporters who may be recently bereaved.
- > 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

- > Design and deliver campaigns that encourage supporters to give in memory, including tribute funds, memorial events,
- > Develop, implement and maintain effective supporter journeys for in memory pledgers.
- > Explore opportunities and make recommendations for Acorns In Memory product development and optimise existing tribute fund products.
- > Partner with Care, Events and Community Fundraising teams to support events and activities linked to in-memory giving.

Data, Insight & Performance

- > Use data, insights, and supporter feedback to refine legacy and in-memory audience segments, messaging, and journeys.
- > Set and monitor KPIs, measure campaign performance, and report on results to internal stakeholders.
- > Maintain accurate records of legacy pledgers and in-memory supporters in Donorfy and First Class.

Budget management


- > Develop annual budgets and plans to deliver the legacy and in memory programme
- > Monitor and report on monthly income and expenditure with provision of commentary and to recommend mitigation plans for underperformance
- > Work with the Finance team to ensure restricted income and accruals are dealt with appropriately, in accordance with legislation and Acorn's policies.

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.

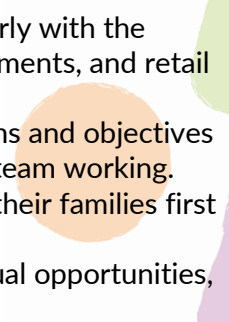
Data Protection and Confidentiality


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.
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- > 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 Manager

	Essential	Desirable
Qualifications	<ul style="list-style-type: none"> > A good level of education and digital confidence and capability. 	<ul style="list-style-type: none"> > Educated to Degree, A-level or equivalent in relevant field > CiCLA or similar fundraising management qualifications e.g. Chartered Institute of Marketing or Fundraising.
Experience	<ul style="list-style-type: none"> > Demonstrable experience of delivering a legacy and/or in-memory programme > Experience of and resilience to meeting targets and KPIs. > Track record of successfully managing and developing relationships with individual supporters, customers or clients. > Experience of delivering presentations or public speaking. > Experience managing and developing high-performing teams 	<ul style="list-style-type: none"> > Previous experience working within a fundraising team. > Experience of working with volunteers > Experience of case management and/or probate /charity legal environment > Experience in financial reconciliation and accurate accrual reporting related to complex income
Knowledge	<ul style="list-style-type: none"> > A strong level of knowledge and understanding of probate, trusts, tax and property issues related to charitable legacies. > Basic knowledge of fundraising as an academic discipline > Understanding of the principles of marketing. 	<ul style="list-style-type: none"> > Experience using Donorfy or a similar CRM database. > Experience of working with Smee & Ford reports
Skills and Abilities	<ul style="list-style-type: none"> > Ability to communicate effectively, empathetically, concisely and confidently on the telephone, in writing and in person to a wide and varied audience. > Ability to understand, interpret and present complex information and advice in a clear, succinct and appropriate way for a range of audiences. > High level of proactive solution-finding, with the ability to identify potential risks in legacy case management or supporter journeys and implement mitigations." > Planning & budgeting skills. > Self-motivated > Ability to work independently and as part of a team. > 'Can do' attitude – a natural problem solver with an instinctive ability to foster positivity and creativity within teams. > 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. 	<ul style="list-style-type: none"> > Influencing and networking skills. > Copywriting and content development
Other	<ul style="list-style-type: none"> > Passionate and committed to Acorns mission and values > Willingness to train and learn new skills. 	
Behaviours	<ul style="list-style-type: none"> > Build collaborative relationships across the organisation, creating a culture of cross function working. > Positive, enthusiastic approach & can-do attitude. > Curious, always seeking to understand and improve experience of customers. > Open to change and continuous improvement. > Innovative mindset and passionate about learning. > Commitment to the Acorns strategy & its success. > Driven in your approach to strive for excellence and build lasting partnerships for Acorns. 	

Terms and Conditions of Employment

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Job Title:	Legacy and In Memory Manager
Responsible To:	Head of Public Fundraising
Location:	Nearest Acorns Hospice (Birmingham, Walsall or Worcester)
Salary:	£40,000 per annum
Notice:	12 weeks
Hours:	37.5 hours per week
Holidays:	27 days plus statutory bank holidays
Pension:	Contribution to Group Personal Pension Plan or NHS Pension Scheme (if already in scheme).
Life Assurance:	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.

