

Job Title: Legacy and In Memory Manager

Reporting To: Individual Giving Lead

Direct reports: 1 x Legacy Executive, 1 x Legacy Administrator

Job Summary:

The Legacy and In Memory Manager is responsible for developing and delivering plans to maximise gifts in wills and in memory giving, ensuring a sustainable income stream for the charity whilst providing exceptional levels of supporter care.

This role will oversee the administration of legacies, drive the growth of the charity's Free Wills programme, steward legacy pledgers, and expand in memory fundraising. The Legacy and In Memory Manager will also ensure supporter journeys, audience insight and effective targeting are at the heart of the charity's programme, working with the Individual Giving and Development Lead to create impactful marketing campaigns across a variety of channels.

The post holder will raise awareness of the importance and impact of gifts in wills and in memory giving to a wider audience, both internally and externally, ensuring these vital income streams are embraced at all levels of the organisation.

Key responsibilities:

The responsibilities of the post will be undertaken in accordance with the policies, procedures, and practices of MAAC which may be amended from time to time.

Legacies:

- Develop and implement a legacy giving plan to increase future legacy income.
- Oversee the administration of legacy gifts, ensuring efficient processing and compliance with relevant legal and regulatory frameworks to maximise the potential value of gifts to the charity.
- Line manage the Legacy Executive and Legacy Administrator, providing support and guidance in their day-to-day responsibilities including leading on reviewing high-risk cases and managing escalations in line with the charity's Scheme of Delegation for legacies.
- Grow and promote the charity's Free Wills programme, working the charity's Corporate Partnerships team to recruit new law firms and sustain relationships with existing members to increase the number of legacy pledges.
- Ensure robust stewardship of the charity's Free Will programme participants via engagement on an individual and group basis.
- Develop and implement stewardship plans to cultivate relationships with legacy pledgers, ensuring they feel valued and engaged with the charity, providing outstanding supporter experience.
- In collaboration with the Marketing and Communications team, deliver targeted marketing campaigns and materials to promote legacy giving across various channels, including digital, direct mail, and face-to-face events.



- Monitor and report on legacy income performance, trends, and potential risks.
- Oversee the charity's scheme of delegated authority for legacies, ensuring that all legacy decisions are made in accordance with established policies and procedures, and maintaining compliance with legal and regulatory requirements, and reporting on these as required by senior leadership and the Board of Trustees.
- Keep abreast of developments within the sector and changes to fundraising practice and/or probate law and communicate these to the wider organisation as appropriate.

In Memory:

- Develop and implement annual plans to grow in memory income, ensuring it is a key and sustainable fundraising stream for the charity.
- Build and maintain strong relationships with funeral directors, memorial services, and other key stakeholders to promote in memory giving.
- Create and deliver innovative in memory fundraising campaigns and initiatives, such as tribute funds, online giving pages, and remembrance events.
- Work closely with supporters and families of past patients to provide sensitive and meaningful ways to commemorate loved ones while supporting the charity.
- Ensure the effective administration of in memory gifts, acknowledging donations in a timely and empathetic manner.
- Collaborate with the wider Fundraising and Marketing teams, specifically the community team, to integrate in memory giving into broader fundraising and engagement activity.

General:

- Lead on ensuring that the wider team (including volunteers) are able to champion legacy and in memory giving, including delivering ongoing training and support and acting as an ambassador and role model for your income areas.
- Plan and arrange legacy and in memory events, including legacy pledger and legacy enquirer events.
- Represent the charity at external events, presentations, meetings, and networking opportunities to raise awareness of legacy and in memory giving.
- Facilitate airbase visits with both legacy and in memory supporters, ensuring that the visit is planned and appropriate for all parties.
- Utilise the charity's CRM database and other sources, to identify and steward the pipeline of potential legacy donors, in particular maximising on any opportunities to steward in memory supporters towards legacy giving.
- Ensure supporter records and communications are logged in accurately and in a timely manner on the charity's CRM system, ensuring guidelines and protocols are always adhered to and all records are up to date.
- Monitor and report on your income portfolio and legacy pipeline, preparing analysis, data, and reports for the Individual Giving and Development Lead, Head of Fundraising and Engagement, and senior leadership team as required.

Leadership:

- Working with the Head of Fundraising and Engagement and Individual Giving and Development Lead, contribute to the annual business planning and budget setting process, ensuring sustainable and scalable growth across legacies and in memory income streams.
- Develop and execute annual plans for key workstreams that consider support retention as well as gaining new support.
- Be a proactive member of the Fundraising and Marketing team, working in partnership with other areas to raise awareness of the charity and maximise the total lifetime fundraising potential of supporters.



- Participate in cross-departmental projects and develop positive collaborative working relationships with colleagues.
- Keep up to date with fundraising trends and best practices in legacy and in memory fundraising.
- Comply with professional codes of conduct, relevant legislation, and regulatory requirements (e.g., the Institute of Fundraising codes of practice, Charity Commission, Fundraising Regulator, GDPR, and Health & Safety).
- Monitor relationships with suppliers and agencies to ensure adherence to contracts and SLAs and effective use of resources.
- Maintain and improve competencies through continuous professional development.
- Be flexible and carry out other associated duties that may arise, develop, or be assigned in line with the broad remit of the post.
- Work occasional weekends and evenings as required in accordance with the charity's operations.
- Travel across our six-county operating region as required to deliver the requirements of the role.

The Charity is committed to safeguarding and promoting the welfare of all stakeholders. All post holders are subject to a satisfactory Disclosure and Barring Service check (DBS) and satisfactory employment references, as well as identification, prohibition, qualification, and barred list checks, which will be required before commencing duties.

ADDITIONAL INFORMATION

This job description should be regarded as a guideline of the duties required and is not definitive. This job description is not intended to be an exhaustive list of activities, but rather an outline of the main areas of responsibility. The nature of the post and the organisation is such that duties may be reviewed in the light of changing circumstances following consultation with the post holder. The post holder will be required to adopt and undertake different or new duties as may be required in line with professional and service development.

CHARITY POLICIES & PROCEDURES

All employees must adhere to and perpetuate all Charity policies and procedures including those relating to Fraud management, Whistleblowing, Information governance, Code of Conduct, Health and Safety, Confidentiality, No Smoking at Work and Equal Opportunities in Employment; including responsibilities under the Disability Discrimination Act. Failure to do so may result in disciplinary action.

HEALTH & SAFETY AT WORK ACT

The post holder is required to take responsible care for the health and safety of him/her and other persons who may be affected by his/her acts or omissions at work. The post holder is also required to co-operate with the charity to ensure that statutory and charity safety regulations are adhered to.

MANAGING RISK: MAINTAINING SKILLS & LEARNING FROM PROBLEMS

Reducing risk is everyone's responsibility. All staff in the charity must attend training identified by the Chief Executive (or by the Business Manager). The charity uses risk assessments to predict and control risk and the incident reporting system to learn from mistakes and near misses and so improve the service provided. All employees are expected to ensure they are familiar with and adopt the Infection Prevention and Control policy/procedures and all safe-working practices required in their work activity" and specifically with reference to hand hygiene and aseptic techniques.

CONFIDENTIALITY

All employees must observe and comply with the requirements of the Data Protection Act 2018, and associated legislation, and with the Common Law Duty of Confidentiality. The unauthorised use or disclosure of donor, staff or other personal information is a disciplinary offence and could result in a prosecution for an offence or action for civil damages under the Data Protection Act 2018, or associated legislation.

FREEDOM OF INFORMATION

The post holder must be aware that any information held by the Charity in theory could be requested by the public, including emails and minutes of meetings. It is therefore essential that records are accurately recorded and maintained in accordance with the Charity's policies.'

CONTINUING PROFESSIONAL DEVELOPMENT

There is a requirement to participate in the Charity's Personal Development and Review process. Personnel are required to attend training as required by the Charity to help them perform their role safely and competently and to ensure the safety of others. This includes induction and refresher training at charity set intervals, as defined in the Workforce management policy.

REGISTRATION

If applicable, you are required to be fully registered with the appropriate association for your post and for you as post-holder. Failure to produce confirmation of current registration with the appropriate body will mean that you will not be permitted to commence (or continue with) your duties, nor will you be paid for those duties for the period of delay, until such time as you are able to provide this confirmation. **NB:** It is your duty to ensure that your registration is kept up to date.

DISCLOSURE AND BARRING SERVICE (DBS)

Post holders whose work involve, or may involve, direct contact with vulnerable adults and/or children, and/or with access to managing accounts, are subject to DBS checks every three years. Where you work directly with vulnerable adults or children, under the conditions of the Rehabilitation of Offenders Act 1974, as amended, you are not entitled to withhold information about convictions which otherwise might be considered 'spent'. There is an ongoing obligation to declare any civil or safeguarding issues, investigations, convictions and cautions against you, during the course of your employment

SAFEGUARDING

The Charity has a zero-tolerance approach to the abuse of children, young people and vulnerable adults. All employees are required to promote and safeguard the welfare of children and young people and comply with the Local Safeguarding Children Board Procedures and the Children Act (1989, 2004).

TRAVEL TO OTHER SITES

You may be required to travel to any of the airbase locations or locations where fundraising events take place. Please complete the travel expenses form. Expenses will not be paid where travel expense forms are not fully completed.

SMOKING STATEMENT

The Charity is a NO SMOKING environment. Smoking in all areas of the building and premises is prohibited. Smoking may only take place in non-public areas.

DIVERSITY AND EQUAL OPPORTUNITIES

The Charity welcomes all persons without regard to age, ethnic, or national origin, gender or sexual orientation, religion, lifestyle, presenting illness, marital or parental status or disability. We aim to provide a non-judgemental service at all times.