

Legacy & In Memory Manager



Fundraising/Hybrid (home and office)

What you will be doing

The Legacy and In Memory Manager will be responsible for growing Legacy and In Memory income to meet agreed annual targets. The post holder will inspire people to give, developing and implementing a strategic cultivation and stewardship programme, building upon, and expanding YHA's successes to date.

What you will deliver

1. You'll work with the Senior Individual Giving Manager to develop, manage, and plan to grow Legacy and In Memory donations.

- You'll ensure all materials produced are accurate and compliant with relevant data protection, charity, gift aid legislation and the Fundraising Regulator's Code of Fundraising Practice
- You'll represent and protect the charity's interests in the administration of Legacies, in line with Probate Law, Estate Administration Law, Institute of Legacy Management best practice and Charity Commission guidelines.
- You'll keep abreast of all developments in legislation and regulatory control which cover Legacy and in memory fundraising activity.
- You'll work in liaison with the Senior Individual Giving Manager to shape, plan and deliver a Legacy and In-Memory strategy that delivers income growth, maximising the conversion of donors into Legacy Pledgers.

2. You'll support other teams and members, undertake activities, develop reports in a timely manner and in line with best practices.

- You'll ensure notifications and gifts are dealt with efficiently, appropriately and in a timely fashion.
- You'll undertake all activities in line with best practice standards and processes as set out by the Chartered Institute of Fundraising and industry regulatory bodies.
- You'll contribute to and support other team and departmental work as appropriate, delivering effective supporter engagement and cultivation activities.
- You'll provide timely and informative reports to line manager on progress being made against KPIs and overall income targets.
- You'll support members and donors to engage with YHA and its work to develop new Legacy Pledgers.

3. You'll make sure all processes and materials produced are accurate and compliant with legislation.

- You'll work with our marketing and communications teams on content that supports the implementation of YHA's Legacy and In memory strategy.
- You'll manage the implementation of marketing plans for In Memory giving, producing effective marketing initiatives and project managing from conception to evaluation.
- You'll work to grow the volume of Legacy pledges by expanding on marketing successes to date and testing new approaches.
- You'll establish systems and processes to measure the impact of marketing activities to deliver greater efficiency and effectiveness.
- You'll deliver marketing campaigns in line with YHA brand and Legacy proposition developing tailored advice guides and other key communication materials to promote Legacy giving.



Helpful



Efficient



Authentic



Respectful



Team-spirited

4. You'll develop and assist in a programme of training around legacies and reporting

- You'll develop a clear Legacy proposition based on insight and research of the current supporter base.
- You'll benchmark the Legacy programme against industry benchmarks and KPIs.
- You'll assist in a programme of training for relevant staff across the network to incorporate Legacy messaging into their activities where appropriate.
- You'll work with relevant teams to ensure Legacy asks are included as part of the supporter/customer journey for all types of supporters, donors, volunteers, and staff.
- You'll provide accurate forecasts of projected Legacy income, based on pledges and notifications pipeline.
- Develop reports and analysis through using the database to better inform decision-making and targeting.

Knowledge, skills, and experience needed.

- Experience of developing and implementing a Legacy and In Memory strategy, with emphasis on marketing activity and supporter engagement.
 - Experience of cultivating supporters through to a Legacy ask.
 - Experience of developing and delivering stewardship plans for enquirers, donors and legators
 - Experience of developing and implementing legacy marketing plans
 - Experience of working with and managing external agencies
 - Experience of delivering Legacy cultivation events
 - Experience of reporting and providing robust analysis to inform decision making.
 - Experience of using specialist Legacy databases and/or a CRM database
 - Experience of Legacy administration
 - Experience and understanding of charity law in relation to Legacies, Gift aid, and information management.
 - A familiarity of speaking confidently to supporters and colleagues about legacies
 - An understanding of YHA, its Charitable Objects and the sector in which it operates.
 - An understanding of the importance of confidentiality, and handling sensitive information and situations.
 - Proficient in the use of Microsoft Packages, specifically e-mail, word processing and spreadsheets.
 - Flexible approach to working, including some weekend working and occasional visits to the network.
 - Ability to travel across the network and to stay overnight when delivering supporter events.
 - Results focused whilst displaying integrity in own behaviour and dealings with others.
 - Proactive self-starter, with the ability to work on own initiative.
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- We welcome candidates with lived experiences that they are willing to share, that can inform/shape our approach, and help to reach those facing a range of personal or professional challenges.
 - We note that communication can take many forms. This may include sign language; other adaptations for those with hearing impairments; or other speech or language difficulties.
 - Where there is a need for additional assistance and reasonable adjustments required by the postholder to carry out the role, these will be supported. (Note this needs to remain in all job descriptions)

Role details

Reports to: Senior Individual Giving Manager

Financial responsibility: Responsibility for income generation (currently between £800k - £1.4m) and financial expenditure budget for Legacies and In Memory

Line management: You will have no direct reports, but will be able to draw on teams and expertise to support you.

Relationships: Internal: Strategy and Engagement Directorate, Operations team, Hostels and key teams in the National Office. External: Members, supporters, customers, fundraisers, volunteers and partners and suppliers.

Accountability: The job holder will be accountable for the developing, implementing, leading and delivering an In Mem, Legacies and Major Donor strategy and plan, on time and to budget.

Author: Head of Fundraising and Supporter Engagement

Date completed/reviewed: June 2024



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