

Job Description

Job Title	Senior Legacy Officer
Salary	Up to £35k
Location	Hybrid – 2 days per week at St Luke's Hospice, Kenton Road, London, HA3 0YG
Reporting to:	Head of Public Fundraising

St Luke's Hospice – Caring for Harrow and Brent

St Luke's Hospice cares for people approaching the end of their life in Harrow and Brent. We aim to give the people we care for the best possible quality of life, every day. Supporting local people and their families is at the heart of what we do – focusing on what matters the most to them is at the centre of our care.

The care we give is free of charge, available to all, and respects the cultures, religions and beliefs in our richly diverse community. Our care is given with compassion and dignity and involves not just looking after the patient but also includes supporting the people closest to them.

The NHS funds 40% of the cost of St Luke's services, which means the care of 6 out of 10 of our patients is funded by our community, making donations, taking part in events, supporting our shops and making gifts in wills. Our local community is a vital partner in our care, kindly supporting us through their donations and fundraising alongside the dedication of over 800 incredible volunteers who give us their time to support the best possible end of life care for local people.

Job Purpose

The Senior Legacy Officer will lead the delivery and development of St Luke's legacy fundraising programme, taking ownership of one of the hospice's most critical income streams.

Reporting to the Head of Public Fundraising, the role will focus exclusively on growing legacy income through strategic marketing, supporter engagement and stewardship, pipeline development and internal advocacy. The post holder will be responsible for the day-to-day management and continuous improvement of the legacy programme, using insight and best practice to maximise long-term income while delivering an outstanding supporter experience.

Main Duties & Responsibilities

Legacy Programme Development and Delivery

- Lead the delivery and ongoing development of St Luke's legacy fundraising programme, ensuring long-term income growth and a strong pipeline of legacy prospects and pledgers.
- Plan and deliver multi-channel legacy marketing and awareness campaigns, including direct mail, digital communications and events.
- Manage and promote legacy products and initiatives, including Free Will Writing offers and legacy information events, working closely with solicitors and external partners.
- Source, develop and manage compelling case studies and content to demonstrate the impact of gifts in wills, in line with brand and ethical standards.

Supporter Engagement and Stewardship

- Build, manage and steward relationships with legacy supporters, enquirers and pledgers, delivering sensitive, timely and appropriate communications.
- Develop and optimise legacy supporter journeys to strengthen engagement, trust and long-term commitment.
- Ensure accurate recording, tracking and forecasting of legacy data, income and pipelines through the CRM (Customer Relationship Management system).

Data, Insight and Performance

- Monitor, analyse and report on legacy activity, pipeline performance and income trends, using insight to inform planning and prioritisation.
- Maintain accurate budgets and expenditure tracking for legacy activity, ensuring value for money and compliance with internal controls.
- Use testing and evaluation to continuously improve campaign effectiveness and supporter experience.

Internal Engagement and Collaboration

- Act as the internal lead and advocate for legacy fundraising, embedding legacy awareness across fundraising, retail, clinical and volunteer teams.
- Provide guidance and expertise to colleagues to ensure legacy messaging is integrated consistently across the organisation.
- Work collaboratively with supporter care, communications and data colleagues to deliver a high-quality, compliant and supporter-focused legacy programme.
- Contribute to the long-term value of supporters by identifying and sharing appropriate opportunities across fundraising activities, working collaboratively with colleagues to support integrated supporter engagement.
- Actively support a 'one team' culture across Fundraising, working in partnership to maximise supporter experience and organisational impact.

External Relationships and Compliance

- Work closely with our Legacy Administration supplier to deliver legacy income and to foster good relationships with executors, next of kins and others, once notifications are received.
- Manage relationships with external suppliers, agencies and professional partners to deliver high-quality legacy activity.
- Ensure all legacy fundraising activity complies with fundraising regulation, GDPR, data protection and internal governance requirements.
- Represent St Luke's at external events, talks and partnership meetings as required

General Duties & Responsibilities

This job specification may be modified in the light of development and changing circumstances, according to the needs of the service, and in consultation with the post holder. The post holder should be prepared to undertake any further duties that arise as the post develops.

Confidentiality

The contractual relationship between the Hospice and its employees is founded on trust. Employees will treat as confidential all information regarding the business of the Hospice, information with regard to and agreements with suppliers, and information gained about other employees and consultants.

Health & Safety

Employees must be aware of the responsibilities placed on them under the Health and Safety at Work Act (1974) to ensure that the agreed safety procedures are carried out to maintain a safe environment for employees and visitors.

Mission and Core Values

All Hospice staff are expected to work in line with St Luke's Mission and Core Values as these precepts act as a value base which directly influences how all work activities are undertaken. The ethos of the Hospice should be apparent in the behaviours and attitudes of all employees as the work they undertake, whether it is direct or indirect, is ultimately for the benefit of patients. The Mission and Core Values are an integral part of all job descriptions, the probationary period and performance and development reviews.

Equal Opportunities

St Luke's Hospice is committed to Equal Opportunities for all present and potential members of staff and patients. Therefore St Luke's Hospice expects all employees and volunteers to understand, support, and apply this policy through their working practices which requires all individuals to be treated with respect, dignity, courtesy, fairness and consideration.

Person Specification

Knowledge

- Good knowledge of legacy fundraising and gifts in wills fundraising within the charity sector. (Essential)
- Working knowledge of fundraising regulation, GDPR and data protection requirements. (Essential)
- Understanding of stewardship approaches (Essential)
- Understanding of long-term income forecasting and pipelines (Desirable)
- Understanding of Equality, Diversity and Inclusion principles and a commitment to applying them. (Essential)

Skills

- Excellent relationship management skills, with the ability to communicate sensitively and effectively with supporters and professional partners. (Essential)
- Strong copywriting and storytelling skills, able to produce compelling legacy communications. (Essential)
- Proven project management skills, with the ability to manage multiple activities and suppliers. (Essential)
- Strong analytical and numerical skills, confident in using data, budgets and forecasts to inform decisions. (Essential)
- High level of organisation, initiative and attention to detail. (Essential)
- Ability to be act sensitively to the needs of our donors and speaking to bereaved families.

Experience

- Good experience working in legacy fundraising, a closely related area of supporter-led fundraising or direct marketing. (Essential)
- Experience of delivering legacy or direct marketing campaigns and awareness activity. (Essential)
- Experience of managing external suppliers, agencies or professional partners. (Essential)
- Experience of using CRM systems to manage pipelines, reporting and supporter records. (Essential)

Qualifications

- No formal qualification required; excellent written English and strong communication skills essential. Relevant fundraising or marketing qualifications are desirable.