

Job Title:	Legacy Stewardship Manager	Function:	Marketing, Communications & Fundraising
Reports To Manager:	Senior Philanthropy Manager	Job Family:	Support & Professional
Date:	March 2025	Band:	6

Purpose: Plan and deliver PDSA's legacy stewardship programme, creating inspiring, high-quality communications and experiences that make supporters feel valued, deepen their connection with PDSA, and grow future legacy income through long-term supporter conversion and retention.

Responsibilities	Performance Measures	Organisational Skills & Values
- Lead, manage and develop the Legacy Stewardship team through the whole employee life cycle. - Create and implement a strategic approach to legacy stewardship, ensuring meaningful engagement with pledgers, through a tiered approach. - Develop and deliver a high-quality multi-channel, tiered legacy stewardship programme to deepen engagement and build loyalty. - Deliver personalised one-to-one and mass stewardship to supporters, to build meaningful and long-lasting relationships. - Support the overall business plans of the Marketing Team, working with colleagues in the Legacy team on the planning, delivery and optimisation of our stewardship communications to ensure all activities are co-ordinated and supporter focused. - Working in collaboration with colleagues in Philanthropy to realise the opportunity for raising awareness of gifts in wills with our major donors to secure future pledges - Ensure consistent pledger and legator recognition, working closely with colleagues in Philanthropy to align stewardship and recognition programmes. - Deliver in-person bespoke legacy events and work with other teams across the charity on collaborative supporter events. - Monitor and improve processes for tracking and enhancing stewardship activities, ensuring best practices and compliance. - Analyse and report on stewardship activities, using data insights from legacy flags to inform strategy and demonstrate impact. - Engage and inspire colleagues across the organisation with the impact of gifts in wills. - Work closely with the Legacy Administration team and the NCSC to support the management of complex or technical legacy enquiries. - Manage budgets for legacy stewardship activities, ensuring cost-effective use of resources and delivery against financial targets. - Compliance with all PDSA policies and procedures.	- EPIC flag movement in line with targets - Pledger Engagement & Retention - Acquisition Pipeline Growth at every stage from enquirers, intends, conversions to pledger - Supporter Satisfaction & Feedback - Team Performance & Development - Enquiry Resolution Efficiency - Budget & Compliance Adherence - Operate in line with departmental SLAs	- Head and Heart - Better together - Passion with purpose - Planning and organising - Acting commercially - Leading Effectively
	Dimensions	Role-specific knowledge & skills
	- Direct Reports: 3 - Indirect Reports: 0 - Budget: In line with expenditure budget - Internal Contacts: MCF colleagues, Legacy Admin team, NCSC, D&A team - External Contacts: Supporters, including Legacy enquirers, intends and pledgers	Essential: - In-depth knowledge and experience of Legacy fundraising - Proven experience in Stewardship best practices - Experience of relationship management strategies - Strong understanding of fundraising regulations & compliance - Experience of budget management - Excellent communications skills Desirable: - Legacy marketing understanding - Legal aspects of legacies - CRM systems & reporting
Approved By: People Services		Date: October 2026