

## Job Description

<b>Job Title:</b>	Senior Legacy Officer
<b>Directorate:</b>	Fundraising Directorate
<b>Reports To (role):</b>	Senior Manager- Legacies

### About the Role

The Individual Giving and Legacies team at Centrepont has grown significantly in recent years and is forecast to raise £25.6m in 2025/26, with legacies contributing an increasingly vital proportion of long-term, sustainable income. As part of the Legacy & In Memory strand within Individual Giving, this role plays a crucial part in delivering our ambition to raise over £2.5m annually, ensuring we can continue supporting young people now and into the future.

This role is integral to Centrepont’s legacy programme, growing future income by deepening relationships with existing supporters and inspiring new audiences to consider leaving a gift in their Will. Through planned, thoughtful and meaningful communications, you’ll ensure supporters feel informed, valued and connected to the young people whose futures they are helping to secure.

You will work collaboratively across Centrepont to ensure all legacy activity is integrated, insight-driven and genuinely supporter-centric. You will help generate compelling content, stories and propositions that engage supporters, grow pledger numbers and increase long-term loyalty and lifetime value.

As a creative and proactive fundraiser, you will bring experience of delivering high-quality campaigns, managing agency relationships and developing engaging supporter journeys. You will play a key role in ensuring our legacy programme continues to grow and deliver meaningful, long-term impact.

### Key Responsibilities and success measures

This role is responsible for delivering Centrepont’s legacy marketing and supporter engagement activity, driving long-term income growth and supporter relationships.

<b>KR 1</b>	<p><b>Legacy Marketing</b></p> <ul style="list-style-type: none"> <li>• Lead the development and delivery of multi-channel legacy marketing campaigns, including direct mail, telemarketing and paid media (digital and DRTV)</li> <li>• Work closely with the Data &amp; Insight team to monitor campaign performance through regular reporting and post-campaign analysis</li> </ul>
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	<ul style="list-style-type: none"> <li>• Take a data-led and agile approach, adapting campaigns based on performance and external factors</li> <li>• Apply a test-and-learn approach to improve targeting and audience engagement</li> <li>• Manage campaign budgets effectively, ensuring activity delivers against KPIs and agreed expenditure</li> </ul>
<b>Success measure:</b>	Growth in the legacy pipeline, including increased engagement, guide requests and conversion from hand raisers to pledgers
<b>KR 2</b>	<b>Legacy Supporter Journeys</b> <ul style="list-style-type: none"> <li>• Support the development and delivery of supporter journeys across warm and cold audiences, pledgers and cross-sell opportunities</li> <li>• Deliver multi-channel communications across email, telemarketing and direct mail</li> <li>• Work with agencies and internal stakeholders to deliver timely, engaging and high-quality supporter experiences</li> <li>• Inspire supporters by clearly communicating the impact of their support on young people experiencing homelessness</li> </ul>
<b>Success measure:</b>	Increased engagement and conversion of legacy prospects, resulting in more supporters leaving a gift in their Will
<b>KR 3</b>	<b>Relationship Management</b> <ul style="list-style-type: none"> <li>• Manage relationships with external agencies (creative, media, telemarketing and free Will providers) to deliver campaigns on time and within budget</li> <li>• Support onboarding of new suppliers, ensuring strong understanding of Centrepoint and legacy giving</li> <li>• Ensure invoices are processed within agreed SLAs and all compliance requirements (including DPIAs) are completed</li> <li>• Build effective working relationships across Centrepoint, including Supporter Care, Finance, Data &amp; Insight, Communications and wider Fundraising teams</li> </ul>
<b>Success measure:</b>	Strong, collaborative partnerships that deliver campaigns effectively and achieve agreed targets
<b>KR 4</b>	<b>Reporting, Insight and Data</b>

	<ul style="list-style-type: none"> <li>• Use CRM systems (e.g. Raiser’s Edge/NXT) to analyse campaign performance</li> <li>• Lead on campaign evaluation, providing clear insight and recommendations for future improvement</li> <li>• Work with Data &amp; Insight to optimise audience targeting using segmentation and modelling approaches</li> <li>• Apply continuous improvement across all legacy and in-memory activity</li> </ul>
<b>Success measure:</b>	Improved campaign performance and optimisation of the legacy and in-memory programme
<b>KR 5</b>	<b>In Memory Giving Review and Programme</b> <ul style="list-style-type: none"> <li>• Support the development of in-memory products, including tribute funds</li> <li>• Contribute to the stewardship of in-memory supporters</li> <li>• Support growth in income, engagement and lifetime value</li> </ul>
<b>Success measure:</b>	Increased income, engagement and supporter retention within the in-memory programme

### Other tasks and success measures

<b>Task 1</b>	<b>Professional and Cross-team Working</b>
Success measure:	<ul style="list-style-type: none"> <li>• Contribute to a culture of collaboration and integration in team, directorate and wider organisational meetings</li> <li>• Where possible identify opportunities with other teams for collaboration to enhance the supporter experience and promote our campaigns.</li> </ul>
<b>Task 2</b>	<b>Bring a culture of energy, creativity and innovation to ensure we are always inspiring our supporters</b>
Success measure:	<ul style="list-style-type: none"> <li>• Taking the time to meet with colleagues and go on service visits</li> <li>• Staying up to date with wider organisational developments</li> </ul>
<b>Task 3</b>	<b>Understand the latest developments and regulations in Fundraising, Legacy Marketing and GDPR</b>
Success measure:	<ul style="list-style-type: none"> <li>• To effectively monitor competitor activity, suggest new ideas and keep up to date with industry trends, compliance and best practice.</li> <li>• Research into training courses and attend webinars that will improve knowledge in this area.</li> </ul>

	<ul style="list-style-type: none"> <li>Share updates with team and wider Centrepont when necessary</li> </ul>
<b>Task 4</b>	<b>Building and Managing Stakeholder Relationships</b>
	<ul style="list-style-type: none"> <li>Actively attend meeting, participate in training sessions and engage with colleagues in Individual Giving team, Fundraising and wider organisation</li> <li>Build professional relationships with frontline staff i.e. Housing, Health Team and Helpline</li> </ul>
Success Measure	<ul style="list-style-type: none"> <li>Effective stakeholder relationships that support legacy and in-memory activity, improve internal relationships and enhance the supporter experience</li> <li>Improved collaboration with frontline teams reflected in better understanding of legacy and in-memory fundraising</li> </ul>

### Role specification

Category	Essential	Desirable	Assessment
<b>Experience, Knowledge and Skills</b>			
Experience working in Legacy Marketing and/or Direct Marketing or Relationship Fundraising	E		A, I
Strong working knowledge of direct marketing techniques and mechanics such as regular giving products, supporter journeys, prompt strategies etc. Direct hands-on experience having led on these campaigns.	E		A, I, R
Knowledge of the UK Data Protection Act, PECR and GDPR.		D	A, I
Substantial experience of prioritising and managing a multi-disciplinary workload effectively and working to agreed deadlines	E		A, I
Knowledge of CRM systems (ideally Raisers Edge), email broadcast systems i.e. Dotmailer or similar and Google Analytics.		D	A
Ability to analyse information and data to make judgements on issues presented, and to develop performance management reports.	E		A, I

Experience of managing external agencies and suppliers	E		A, I
Ability to think creatively and innovatively	E		I
Excellent numerical skills and ability to analyse and present campaign results.	E		A, I
Empathy with homeless young people and an ambition to work towards Centrepoint's ambition of ending youth homelessness by 2037	E		A,I
Commitment to Equality, Diversity and Inclusion	E		A, I
<b>Communication and Building Relationships</b>			
Excellent written and verbal communication skills, including the ability to deliver presentations and produce written documents to a high standard.		E	A, I
Excellent interpersonal skills with the ability to establish and maintain good working relationships at all levels, stakeholders and, across agencies and suppliers	E		A, I
<b>Training and Qualifications</b>			
Willingness to attend training courses and workshops to further knowledge and upskill	E		I

**Key:** A = Application form. I = Interview. R = Reference. T = Test. C = Certificate.

DC = Document checks.

## Centrepoint Values

All staff at Centrepoint are expected to work according to our six values. Below are examples of the behaviours expected for each of them. These will be assessed at interview and are included here to inform your expectations of the type of person we are looking for to join our organisation.

<p><b>Integrity</b></p> <p><b><i>We always put the good of young people and Centrepoint first</i></b></p> <ul style="list-style-type: none"> <li>• We commit to living these values in our professional lives at Centrepoint</li> <li>• We work hard to build trust and productive relationships</li> <li>• We are honest and transparent</li> <li>• We confront issues early in a direct and constructive way</li> </ul>	<p><b>Energy</b></p> <p><b><i>We are ambitious for young people and we have relentless drive, commitment and resilience to achieve that</i></b></p> <ul style="list-style-type: none"> <li>• We act decisively, using our energy to deliver and exceed expectations</li> <li>• We understand our strengths and use them to strive for excellence</li> <li>• We have creative optimism and we embrace change and drive it</li> <li>• We have the courage and stamina to make tough decisions and see them through</li> </ul>
<p><b>Humility</b></p> <p><b><i>Our work is a service that supports and challenges each person in our sphere of influence to fulfil their potential and ensure that they are engaged and inspired to perform</i></b></p> <ul style="list-style-type: none"> <li>• We show empathy, sincerity and are servant-hearted in our approach</li> <li>• We are self-aware; continuously seeking to improve and we take full responsibility for our own development</li> <li>• We offer to help without hesitation and ask others for support when we need it</li> </ul>	<p><b>Entrepreneurial</b></p> <p><b><i>We are enterprising and innovative – professional, optimistic and always thinking about how to improve</i></b></p> <ul style="list-style-type: none"> <li>• We are commercially aware and financially conscious</li> <li>• We communicate well and bring people with us</li> <li>• We know and understand our business and the impact of both internal and external forces</li> <li>• We always ask ourselves how it can be done better; we are more ‘why not?’ and have the flexibility to adapt</li> </ul>
<p><b>Accountable</b></p> <p><b><i>We know what we have to do and why. We have high standards and expectations of ourselves</i></b></p> <ul style="list-style-type: none"> <li>• We have a clear direction and are fully accountable for delivery in our area</li> <li>• We take personal responsibility to deliver and exceed expectations</li> <li>• We seek and gain the commitment of others; helping others to achieve what they need to do, by inspecting what we expect.</li> <li>• We celebrate success and reward the right behaviour at the right time; fully supporting the</li> </ul>	<p><b>Focused</b></p> <p><b><i>We deliver for and with young people in a way that is creative, inspiring and enjoyable</i></b></p> <ul style="list-style-type: none"> <li>• We put young people at the heart of all we do</li> <li>• We are mindful of risk, seeking to be risk intelligent</li> <li>• We create a collaborative spirit where people are treated equally with respect</li> <li>• We focus relentlessly on results</li> </ul>



**ENDING YOUTH  
HOMELESSNESS**

appropriate challenge of inappropriate workplace behaviours	
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