

## Job Description

### Legacy Officer (Administration)

#### FC2203



### Role Details

**Reports to:** Legacy Manager

**Responsible for:** N/A

**Location:** Central London

**Hours:** Full time. 35 hours a week

**Salary:** £30,618 per annum

**Contract type:** Permanent

**Closing date:** Sunday 6 February 2022

## Our vision and mission

Our vision is of a world in which working horses, donkeys and mules are free from suffering.

Our mission is to transform the lives of vulnerable working horses, donkeys and mules around the world. We relieve their immediate suffering and create lasting change by working with people, communities and organisations.

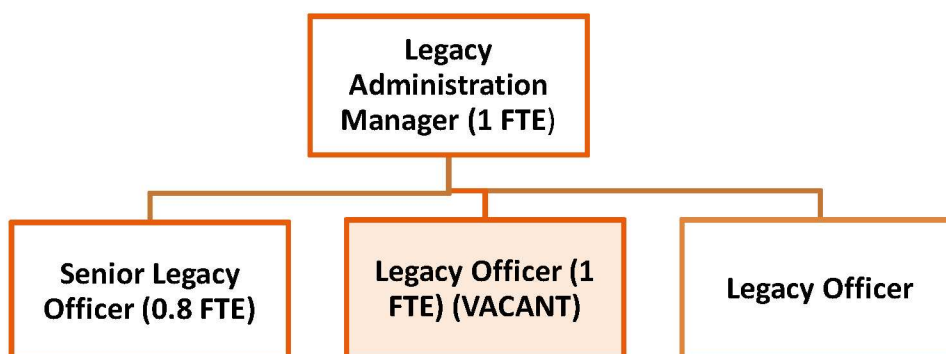
## About Brooke

Brooke is an animal welfare charity that protects and improves the lives of the working horses, donkeys and mules that give people in the developing world the opportunity to work their way out of poverty. Around 600 million people rely on these animals to put food on their tables, send their children to school and build better futures for themselves and their families. Brooke works in more than 15 developing countries, with animal owners, communities, service providers, animal health systems, governments and international organisations to make long-lasting improvements to the lives of animals and their owners.

## Our Values

We are proud to be Brooke. We are resourceful, share new ideas and help each other succeed. Together we make change happen.

## Department Structure and Position of the role



## Purpose of Role

To assist with the effective administration of legacies in order to optimise the benefit from each estate in which the Brooke is a beneficiary.

The role will actively support the Legacy Administration Manager with the promotion of legacy awareness and good relations with potential and confirmed legacy pledgers and solicitors.

The post holder will act as an ambassador and advocate for the Brooke and its mission and will protect the good reputation of the charity.

## Key Responsibilities and Duties

**Assist the Legacy Administration Manager with legacy administration, including:**

- Administer a caseload of ca. 150–200 pecuniary and residuary legacies
- Assist the Legacy Administration Manager and Senior Legacy Officer with the administration of reversionary and contested legacies, including liaising with other charities where necessary;
- Proactively action regular correspondence with pledgers/grieving loved ones/executors/solicitors via email and letter. Process cheques and legacy-related payments in an effective and timely manner and assisting with the thanking process;
- Maintain all legacy data information on CARE and First Class databases;
- Maintain an effective evaluation and follow-up system to review the status of legacy cases, identifying successes and areas for improvements;
- Maintain an up-to-date knowledge of probate law, tax and legacy administration issues and share with colleagues as appropriate;
- Create good working relationships with internal and external contacts in order to obtain the information necessary for completion of the post holder's tasks and responsibilities.

- To ensure that the Brooke's Book of Remembrance is maintained and kept securely at all times. Liaise with family members and lay executors to ensure accurate wording is recorded and photographs of messages are provided if requested.

## General

- Follow the Brooke's equal opportunities statement which aims to clarify the value we place on diversity and steps we take to promote equality of opportunity for all.
- Be compliant with the Fundraising Regulator Code
- Be compliant with GDPR and other relevant legislation
- Perform such additional tasks as may reasonably be requested from time to time by the Line Manager.
- Adhere at all times to Brooke's policies and procedures

## Person Specification

*The skills, abilities, experience and knowledge outlined below provide a summary of what is required to carry out this job effectively. They also form the selection criteria on which the decision on who to appoint will be made. Please ensure that you show how you meet the criteria outlined below in your application.*

Knowledge and experience		Essential	Desirable
1	Educated to GCSE level (in particular Maths and English) or equivalent qualification	✓	
2	Experience of legacy fundraising & administration (in particular working towards or already holding CiCLA) and committed to continual professional development (CPD)	✓	
3	Excellent written and spoken English language skills and able to communicate with a diverse range of stakeholders in a respectful manner.	✓	

<b>4</b>	Experience of providing high quality administrative support role and excellent customer care both verbally and in writing.	✓	
<b>5</b>	Experience of working with databases and data input work with high levels of accuracy and attention to detail.	✓	
<b>6</b>	Excellent IT skills including standard Microsoft packages such as Word, Excel, Access and PowerPoint	✓	
<b>7</b>	Experience of effective time management and meeting deadlines. Able to prioritise workload multi task in a fast paced environment	✓	
<b>8</b>	Experience of building effective working relationships with a wide range of internal and external stakeholders.	✓	
<b>9</b>	Experience of working well independently on own initiate and working effectively as part of a team	✓	



Brooke Competencies	Skills & Abilities
<b>Self-Management</b>	Taking responsibility for own actions, behaviours and outcomes
<b>Learning</b>	Taking responsibility for own learning and fostering growth and development in others
<b>Relationship Building</b>	Creating and maintaining harmonious and constructive working relationships with others internally and/or externally
<b>Planning and Organising</b>	Ensuring that time and resources are utilised to best effect for the achievement of the Brooke's goals and our mission and that others are committed to agreed courses of action
<b>Effective Decision Making</b>	Making clear, informed and timely decisions that lead to effective outcomes in line with the Brooke's mission.
<b>Change and Improvement</b>	Seeking out and developing new ideas and approaches, responding positively and constructively to change and fostering a culture of continuous improvement
<b>Collaboration and Cooperation</b>	Working respectfully, effectively and collaboratively with others in your team, across the organisation and externally to deliver effective outcomes
<b>Communication &amp; Influence</b>	Communicating clearly, concisely and compellingly in a manner that is appropriate to the audience. Engaging respectfully with others both internally and/or externally to persuade them to adopt courses of action that are in the best interests of the organisation and the animals.

*This job description is a written statement of the key aspects of the above job. This document details the main responsibilities, tasks and includes a note of the skills, knowledge and experience required for a satisfactory level of performance. It is not intended to be an exhaustive account of all aspects of the job.*

## Our Competency Framework

Brooke's competency framework translates Brooke vision, mission and values into easily identifiable behaviours that all staff are expected to demonstrate at all times.

Competency	What it means
<b>Self-Management</b>	Taking responsibility for own actions, behaviours and outcomes
<b>Learning</b>	Taking responsibility for own learning and fostering growth and development in others
<b>Relationship Building</b>	Creating and maintaining harmonious and constructive working relationships with others internally and/or externally
<b>Planning and Organising</b>	Ensuring that time and resources are utilised to best effect for the achievement of the Brooke's goals and our mission and that others are committed to agreed courses of action
<b>Effective Decision Making</b>	Making clear, informed and timely decisions that lead to effective outcomes in line with the Brooke's mission
<b>Change and Improvement</b>	Seeking out and developing new ideas and approaches, responding positively and constructively to change and fostering a culture of continuous improvement
<b>Collaboration and Cooperation</b>	Working respectfully, effectively and collaboratively with others in your team, across the organisation and externally to deliver effective outcomes
<b>Communication &amp; Influence</b>	Communicating clearly, concisely and compellingly in a manner that is appropriate to the audience. Engaging respectfully with others both internally and/or externally to persuade them to adopt courses of action that are in the best interests of the organisation and the animals

## Employee Benefits:

Brooke has a competitive benefits package. To find out more, please visit:

<https://www.thebrooke.org/about-brooke/jobs/employee-benefits>

If you wish to get in touch with us, please contact HR at [recruit@thebrooke.org](mailto:recruit@thebrooke.org)