

<b>Job Title:</b>	Legacy Officer
<b>Department:</b>	Global Fundraising, Legacy Administration
<b>Reviewing Manager:</b>	Legacy Marketing Manager (UK and International) with supervision from the Legacy Administrator
<b>Job Type:</b>	Permanent, Full-time (37 hours per week) or Part-time (4 days per week)
<b>Location:</b>	Godalming, Surrey, UK (hybrid 2 days pw in the office)

### **About us:**

Compassion in World Farming International is a leading global organisation dedicated to ending factory farming worldwide. We were founded in 1967 by Peter Roberts, a British farmer alarmed by the rise of factory farming. Over the past 50 years, we have made major strides in abolishing inhumane practices such as barren battery cages, veal crates, and sow gestation crates in the UK and Europe.

Our approach involves campaigning, advocacy, and engagement with policymakers at national, intergovernmental, and corporate levels, building a movement of individuals concerned about animal welfare and the health and sustainability of our food. We are driven by a passion for animal welfare and food system change, believing in a future where animals are treated with compassion and respect, and where sustainable farming practices prevail for a healthy planet.

Our international headquarters are in Godalming (UK), with team members in 14 countries on four continents including the US, Italy, France, Poland, the Netherlands, Spain, Czechia, China, and a specialist policy office in Brussels.

## **Part 1: JOB PROFILE**

### **1. OVERALL OBJECTIVES OF THE POST**

This is an exciting opportunity to join the Global Fundraising Team at Compassion in World Farming at a crucial time for legacy giving. As the organisation experiences significant growth in legacy income both within the UK and across international markets, the Legacy Officer role has been created to support in the pivotal task of enhancing our capacity to manage an increasingly complex and high-value caseload of legacies. This post will directly contribute to our mission to end factory farming by 2040, by ensuring that legacy gifts, a critical source of income, are efficiently and proactively managed.

With Compassion's expanding global reach and the increasing importance of legacy donations to our financial strategy, this role will support our broader growth objectives, including the development of a robust international legacy administration function. The Legacy Officer will play a key role in maximising the potential of legacy receipts, enabling more accurate forecasting and improving our proactive management of estate reviews. This is a vital position within our team, designed to support both the UK and international markets, as we continue to invest in legacy marketing to drive more pledges and income.

The successful candidate will collaborate closely with the Legacy Administrator and the Legacy Marketing Manager (UK and International) to enhance our legacy operations and will be instrumental in supporting our ambition to expand Compassion's legacy giving programme globally. This post is a unique opportunity to make a meaningful impact in a role that combines administrative excellence with strategic importance, contributing directly to the sustainability and growth of Compassion's mission.

**2. POSITION IN ORGANISATION**

- **Reports to:** Legacy Marketing Manager (UK and International) with supervision from the Legacy Administrator.
- **Key Relationships:** The Legacy Officer will collaborate closely with the Global Fundraising Team and Finance department.
- **Team Role:** The Legacy Officer will support the legacy programme across UK and international markets, ensuring effective administration and contributing to the team’s strategic objectives.

**3. SCOPE IN ORGANSATION**

- **Legacy Administration:** Support the administration of UK and international legacy gifts, ensuring accurate, efficient, and timely processing from notification to final distribution. This includes managing a growing and increasingly complex caseload, and caseload and ensuring compliance with legal and organisational policies.
- **International Expansion:** Support the growth of CIWF’s legacy giving programme in new and emerging international markets. Work closely with global teams to develop and implement strategies that maximise legacy income across different regions, addressing the unique legal and cultural challenges involved.
- **Forecasting and Reporting:** Play a key role in the proactive management of legacy receipts by assisting in forecasting income and conducting estate reviews. Provide regular, detailed reports to inform strategic decisions and optimise legacy income streams.
- **Collaboration and Integration:** Work in close collaboration with the Legacy Marketing Manager and global fundraising teams to ensure that legacy administration efforts are fully integrated with broader fundraising initiatives. Contribute to the seamless coordination between marketing, finance, and legal teams to align legacy activities with organisational goals.
- **Stakeholder Engagement:** Maintain and develop strong relationships with key stakeholders, including executors, solicitors, and international colleagues, to ensure the smooth administration of legacy gifts and to enhance CIWF’s legacy fundraising capacity globally.

**4. DIMENSIONS & LIMITS OF AUTHORITY**

- **Budget:** The Legacy Officer supports and helps to ensure the budget related to legacy income is correct and will support in preparing financial reports and forecasts for review in finance meetings.
- **Policy Recommendations:** May recommend and implement new processes or systems within the scope of legacy administration to improve efficiency.

**5. PERSON SPECIFICATION**

ESSENTIAL	DESIRABLE
<b>Proven Ability, Qualifications &amp; Training</b>	
<ul style="list-style-type: none"> <li>• Experience in legacy administration, preferably within an international context.</li> <li>• Proven track record in managing a complex caseload of legacy gifts, ensuring compliance and maximising income.</li> <li>• Experience in collaborating with international teams and managing relationships with stakeholders across different regions.</li> <li>• Strong analytical and forecasting skills, with attention to detail in reporting and financial management.</li> </ul>	<ul style="list-style-type: none"> <li>• Experience in managing legacies across multiple income streams, including philanthropy and individual giving.</li> <li>• Knowledge of global animal welfare issues.</li> <li>• Experience with Salesforce or similar CRM systems.</li> <li>• Experience with FirstClass database.</li> </ul>

<ul style="list-style-type: none"> <li>High level of literacy and communication skills, both written and oral.</li> </ul>	
<b>Skills, Knowledge &amp; Attributes</b>	
<ul style="list-style-type: none"> <li>Ability to work effectively within a global organisation, understanding cross-cultural dynamics and regional legal frameworks.</li> <li>Fluent in written and spoken English, with strong skills in writing and delivering compelling cases for support.</li> <li>Strong organisational and time-management skills, able to manage multiple priorities under tight deadlines.</li> <li>Demonstrated ability to build strong relationships with internal and external stakeholders.</li> <li>Proficiency in Microsoft Office applications, particularly Excel, Word, and PowerPoint.</li> <li>A collaborative team player with a proactive approach to problem-solving.</li> <li>High level of integrity, ensuring transparency and ethical handling of all legacy gifts.</li> </ul>	<ul style="list-style-type: none"> <li>Ability to build and maintain relationships with executors, solicitors, and other key stakeholders.</li> <li>Experience in leveraging networks to enhance legacy fundraising efforts globally.</li> <li>Able to create compelling written materials to support legacy fundraising efforts.</li> </ul>

**Part 2: DUTIES AND KEY RESPONSIBILITIES**

**6. PRIMARY RESPONSIBILITIES**

Essential duties and responsibilities include the following: Other duties may be assigned.

<b>Task</b>	<b>Time allocation</b>
<p><b>Supporting Legacy Administration Tasks:</b></p> <ul style="list-style-type: none"> <li><b>Legacy Gift Processing:</b> Assist in the administration of UK and international legacy gifts, ensuring tasks are completed accurately and on time, from notification to final distribution.</li> <li><b>Data Management:</b> Maintain and update legacy data in CRM systems, ensuring accuracy and completeness of records for reporting and analysis.</li> <li><b>Documentation and Record-Keeping:</b> Help collate and update legal documents and records related to legacy gifts, ensuring they meet legal requirements and organisational standards.</li> <li><b>Communication with Stakeholders:</b> Communicate with executors, solicitors, and other relevant parties to support the administration of estates and assist in resolving any issues that may arise, along with the other members of the Legacy team.</li> </ul>	<b>50%</b>
<p><b>Assisting with International Expansion Efforts:</b></p> <ul style="list-style-type: none"> <li><b>Market Research:</b> Help research potential international markets for legacy giving and gather basic information on regional legal and cultural factors.</li> <li><b>Strategy Implementation:</b> Support the adaptation and implementation of legacy giving strategies in new international markets by coordinating with global teams and ensuring alignment with local practices.</li> <li><b>Performance Tracking:</b> Assist in monitoring the progress of legacy initiatives in international markets, providing basic reports and helping to suggest improvements.</li> </ul>	<b>20%</b>

<p><b>Supporting Forecasting, Reporting, and Data Management:</b></p> <ul style="list-style-type: none"> <li>• <b>Income Forecasting:</b> Assist in forecasting legacy income by analysing historical data and trends to contribute to financial planning and strategy.</li> <li>• <b>Report Generation:</b> Prepare reports on legacy income and administration, presenting data and findings to inform decision-making processes.</li> </ul>	<p><b>10%</b></p>
<p><b>Champion Internal and External Collaboration:</b></p> <ul style="list-style-type: none"> <li>• <b>Support Internal Collaboration:</b> Assist in coordinating with the Legacy Marketing Manager and other departments to align legacy administration with fundraising goals. Help integrate legacy processes with broader organisational initiatives.</li> <li>• <b>Assist Stakeholder Engagement:</b> Support communication with donors and executors, addressing their questions and concerns. Contribute to building and maintaining positive relationships to enhance the legacy giving programme.</li> </ul>	<p><b>15%</b></p>
<p><b>Compliance and Uphold Ethical Standards</b></p> <ul style="list-style-type: none"> <li>• <b>Support Compliance Monitoring:</b> Help ensure adherence to legal and organisational policies for legacy gifts. Assist in implementing and tracking compliance measures.</li> <li>• <b>Assist with Ethical Practices:</b> Aid in maintaining high standards of ethical practice for handling legacy gifts, ensuring transparency and integrity in related activities.</li> </ul>	<p><b>5%</b></p>

**7. ADDITIONAL TASKS**

To assist with other departmental duties where necessary, as listed below:

- As part of your employment you may be required to travel anywhere within the world in order to carry out the duties of your employment.
- Due to the nature of the role, there may be a requirement to carry out some work out of office hours. This work is to be arranged in accordance with procedures.
- Take due and reasonable care of oneself and others in respect of Health & Safety at Work.
- Act in accordance with the principles of Compassion in World Farming’s Ethical Policy.
- Provide formal and informal training at the request of your line manager or a director, on your areas of expertise, to other members of staff, work experience students, trustees etc.
- The job description is not exhaustive and you may be asked to carry out additional tasks which are appropriate to your job role, as required by your line manager.
- Actively support the promotion and delivery and embedding of equality, inclusion and diversity.

Signature of Line Manager ..... Date .....

Signature of Employee ..... Date .....