

RECRUITMENT PACK

LEGACY EXECUTIVE

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JOB DESCRIPTION



KEY INFORMATION



Job Title and Code

Legacy Executive
BDCH6386



Department/Team

Legacy Administration



Location

Battersea London - Hybrid



Salary & Grade

£29,342 per annum
Grade E



Hours

35 hours per week, but we're always happy to discuss flexible working, part time hours and job share arrangements



Duration

Permanent

ABOUT THE ROLE

As Legacy Executive at Battersea, you will have the opportunity to gain further skills and experience of the fast-growing charity Legacy sector. In this role, you will ensure the fulfilment of the wishes of those animal lovers who have been kind enough to remember Battersea in their Will, and in turn, will be of direct help to some of the most vulnerable animals in our society.

Main Purpose of the Role

- Provides administrative support to the Legacy Administration team, who are responsible for the legacies left to Battersea.
- Manage own caseload of pecuniary legacies, including corresponding sensitively and effectively with family and friends of the people who have left a legacy to Battersea.
- Opportunity to also manage a caseload of non-contentious residuary cases, maximising the gift to Battersea. This will include liaising with external solicitors to ensure that the legacy to Battersea is maximised through proactive case management, such as spotting inheritance tax savings and reviewing Estate Accounts.

- Build relationships with supporters, executors, family members and co-beneficiaries to maximise Battersea's legacy income and protect the reputation of the charity. This includes working closely with lay executors on estates to help them where possible, as well as providing excellent stewardship through supporter engagement, such as sending personalised thank you letters.
- To effectively manage cases, influence and persuade multiple stakeholders (including Solicitors, Executors and surveyors) on issues of law, taxation, disposal of property, Battersea policy and reputational issues (among others).
- Represent the charity's interests when the estate is shared with charity co-beneficiaries, by seeking to reduce costs, collaborating to reach the best outcomes and act as lead charity where appropriate.
- Be responsible for the accuracy of the legacy database (FirstClass 4), ensuring that all relevant information relating to cases is entered and updated with precision to enable the effective planning of the charity's work, and supporting the Legacy Manager with producing accurate monthly reports for the wider senior leadership team.
- Build relationships with supporters, executors, family members and co-beneficiaries.

RESPONSIBILITIES

	Estimated % time
Manage own legacy caseload of pecuniary legacies, including a mix of residuary, specific and other types of cases. This will include communicating with supporters, Executors (including solicitor firms), family members and co-beneficiaries by phone, email and post to maximise legacy income and protect the reputation of Battersea.	60%
Carry out administrative duties such as processing post, answering telephone calls and logging incoming payments.	30%
Support in producing monthly reports for the senior leadership team, and ad-hoc reports as required.	5%
Undertake ad-hoc tasks to assist the team with their work.	5%

The above job description is intended to be an outline of the duties and responsibilities for this role. This is not an exhaustive list, and it is likely to change over time. You may be expected to undertake other duties that are commensurate with this role and grade.

PERSON SPECIFICATION

ESSENTIAL

- Excellent organisational skills.
- Ability to prioritise multiple deadlines and a high-volume workload.
- Ability to keep accurate records and have high attention to detail.
- Self-motivated and pro-active, able to manage their own workload.
- Proven experience of working constructively and collaboratively with others.
- Experience of sharing ideas and suggesting new approaches or ways of working.

DESIRABLE

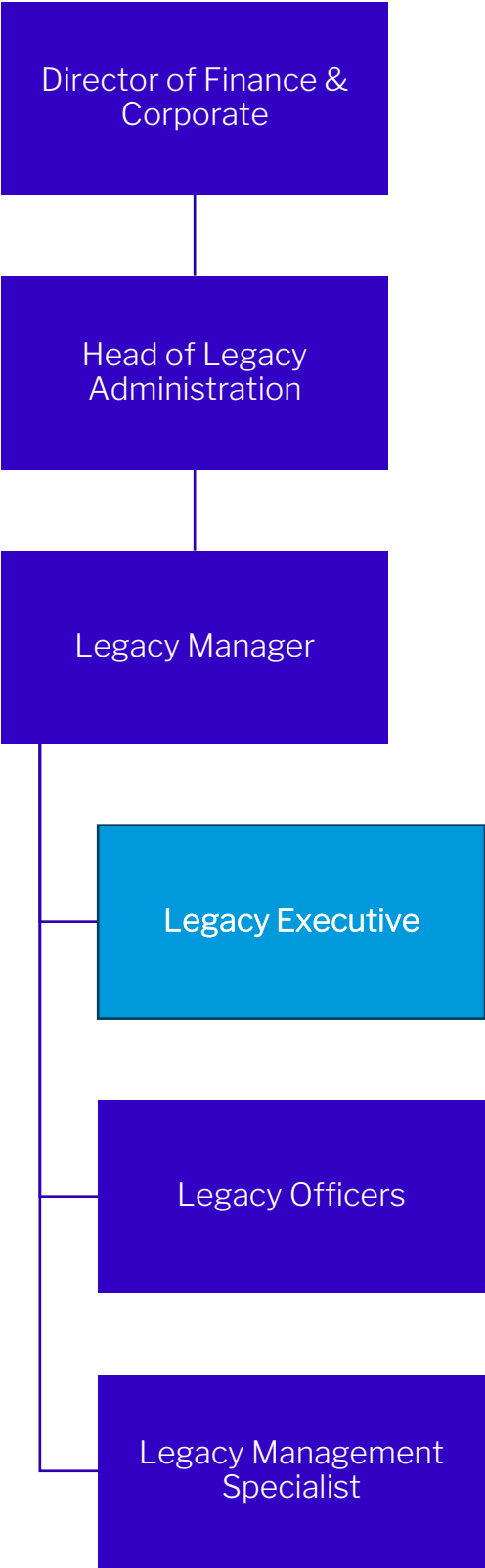
- Previous charity/not for profit experience.
- Experience as an administrative assistant.
- Some database experience.
- Previous experience of accurate record keeping.



HYBRID WORKING POLICY

We operate a hybrid working policy, with our office-based teams splitting their time between site based and home working. We believe this enables our office-based colleagues to maintain the benefits of home working, while allowing for collaboration and interaction with our animal-facing colleagues and maintaining a connection to our cause. As such, you'll be expected to work in our Battersea office for at least 50% of your working week.

POSITION IN THE TEAM



YOUR APPLICATION



KEY DATES



Closing Date

17th May 2026

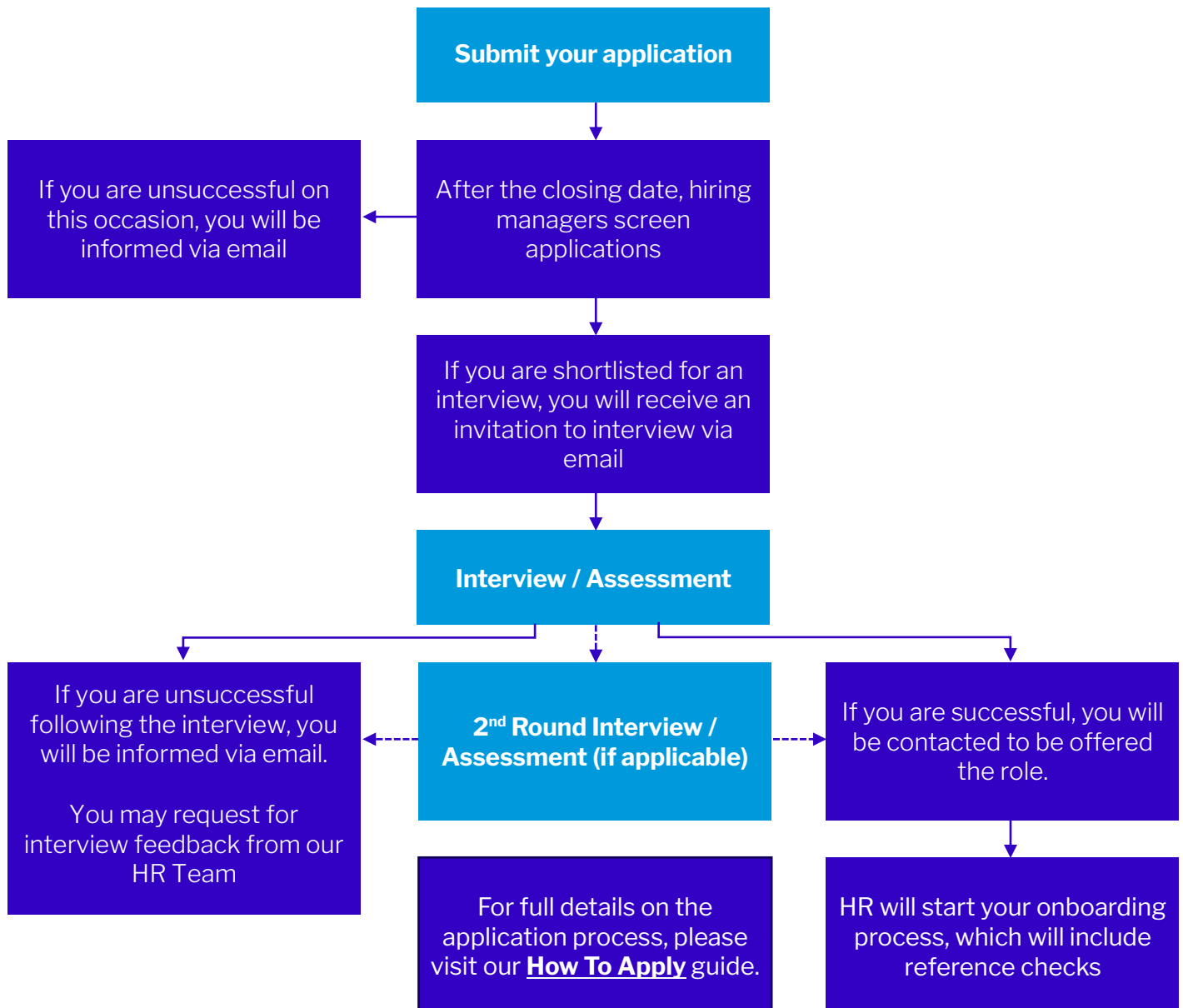


Interview Date

First Round (via Teams): w/c 1st June 2026

Second Round (in person): To Be Confirmed

APPLICATION PROCESS





COMPLETING YOUR APPLICATION

The information below is provided to support you with completing your application.

Our application forms will ask you for:

- Employment History
- Educational History (which is non-mandatory)
- A supporting statement of no more than 1000 words and/or
- Responses to short-answer questions

The statement and short-answer responses are a very important part of your application. This is your opportunity to showcase your knowledge, skills and experience, and how this relates directly to the person specification for the role.

Please provide specific examples where possible and demonstrate your key achievements. You might also consider referencing Battersea's key values in your application (for more on these values, please see the 'Life at Battersea' document).

Once your application is complete, we encourage you to provide your diversity monitoring information. Whilst this is entirely voluntary, completing this information will form part of an anonymised data set to help us understand, measure and take action to ensure our processes are inclusive. Your information will remain confidential, be held in line with GDPR requirements and will not be used to determine whether you are shortlisted for any role(s) you apply for.



ACCEPTABLE USE OF AI

At Battersea, we value expertise. We recognise each candidate that applies to us will have a range of expertise they can offer us, so we want to hear about this in your own words. We understand the support that generative artificial intelligence (AI) software can offer but it can also lead to numerous applications presenting as generic and impersonal. This makes it difficult to gain understanding of your unique experience.

To best showcase yourself, we encourage you to write your responses without the assistance of AI. If you require the use of AI software to aid in completing your application, we ask you use the generative responses as a prompt for writing your answers and avoid copying and pasting. You must also ensure the information presented in your application accurately reflects your experience.

If you are successful to the interview stage of the recruitment process, we ask that you follow the below guidelines on the use of AI at interview stages:

Acceptable use:

- Researching sector trends, company information, or general interview tips
- Practicing interview questions with AI tools to improve communication skills
- Using AI to support with structuring your responses

Please do not:

- Submit AI-generated responses as your own during the interview
- Use AI to impersonate or misrepresent your experience or skills
- Use AI tools during real-time interviews



DIVERSITY AND INCLUSION

OUR COMMITMENT

We are committed to providing a welcoming and inclusive experience for all employees, volunteers and trustees and those hoping to join us. We operate an anonymised shortlisting process and actively seek to ensure our process is fair and equitable for all.

We understand the value of diverse voices, perspectives, and experiences to help us deliver even more for our dogs and cats, and we welcome applicants from all sections of the community.

WORKPLACE ADJUSTMENTS

As a Disability Confident Committed Employer, we will also ask about any adjustments you may need at the application and/or interview stage. And, if you are offered a role with us, we'll talk to you about any workplace adjustments you may need to help you perform at your best. If you would like to talk more about this, please contact 020 3887 8341 or email jobs@battersea.org.uk

REQUIREMENTS FOR WORKING AT BATTERSEA

Please note that all offers of employment require:

- References deemed satisfactory by Battersea
- Proof of eligibility to work in the UK. For details on which documents can be used to certify your right to work, please refer to [Prove Your Right to Work](#)
- Candidate to be at least 18 years old of age at the start of the employment

DATA PROTECTION

The information you provide in your application will be used by Battersea Dogs and Cats Home to assess your suitability for the role you have applied for.

Any special category information (such as information relating to ethnicity or sexual orientation) you choose to provide will only be used by Battersea to monitor and report on diversity and equality of opportunities. The provision of this information is entirely voluntary and will not be used in determining whether you are shortlisted for the role you have applied for.

Further information about how we protect and use your personal data is set out in our [Job Applicant Privacy Notice](#) or contact our Data Protection office at DataProtection@battersea.org.uk



BATTERSEA

HERE FOR EVERY DOG AND CAT

BATTERSEA DOGS & CATS HOME

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Battersea is a charity registered in England and
Wales (206394)

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President HRH Prince Michael of Kent GCV

