



## Role Profile

<b>The Role</b>			
Role Title:	Assistant Legacy Officer	Reporting to (job):	Senior Legacy Income Manager
Legacy job titles covered by this role profile:		Jobs that typically report into this role:	none
Function / Org Unit	Finance	Job Number:	
Base and travel	Hybrid - southwater and home base	Band ( <i>to be assigned by Reward</i> )	A
<b>Role Dimensions</b>			
Number of direct reports	0	Manager/Individual Contributor:	Individual Contributor:
Number of dotted line reports	0	Budget (Operating/Capital)	None
Total No of Reporting Staff (include all direct and indirect reports)	0	Decision Making Authority & Responsibility for Resources	Responsible for own caseload and managing this within agreed KPI's. Day to day decisions on managing workload and conflicting priorities. Most decisions are largely routine or following procedures / guidance but

			<p>some decisions require analysis and problem solving. Post holder knows when to escalate and when to act independently.</p> <p>Income responsibility - responsible for managing a large caseload of cases bringing in several million pounds per annum.</p>
Working Environment	Hybrid - southwater and home base		
<b>Role Purpose</b>	<ul style="list-style-type: none"> <li>• To manage a large caseload of pecuniary and specific legacies with limited supervision by optimising, monitoring and expediting legacy income from these legacies to the RSPCA and its Branches.</li> <li>• In addition, to manage a smaller caseload of straightforward residuary and trust legacies, which will be managed with supervision, training and support as required.</li> <li>• The role holder will also provide essential support to other members of the legacy team with any ad hoc casework cover as required.</li> <li>• The Legacy Income department is the largest source of income for the RSPCA, responsible for approximately £70,000,000 of the Society's annual income.</li> </ul>		
<b>Principal Accountabilities</b>	<ul style="list-style-type: none"> <li>• Proactive management of a large caseload of pecuniary and specific legacies by optimising, monitoring and expediting legacy income from legacies to the RSPCA and its Branches.</li> <li>• Manage a small caseload of residuary and trust legacies with support, training and supervision to ensure the RSPCA receives its full entitlement.</li> <li>• The role holder will provide essential support to other members of the legacy team with any ad hoc caseload cover as required, for example during busy periods or annual leave.</li> <li>• Deal with all activities in line with team Key Performance Indicators and internal Service Level Agreements.</li> <li>• Review case files on a regular basis and take appropriate action to move cases through to conclusion and support the RSPCA's cash flow.</li> <li>• Accurately estimate the value of the legacy and keep this up to date throughout the administration.</li> <li>• Liaising with Executors of the estate, tailoring correspondence dependent on the recipient (Professional Executors or the family and friends of the deceased)</li> </ul>		
<b>Key Interfaces</b>			

The Person	
<b>Personal Attributes and Key Competencies</b>	<ul style="list-style-type: none"> <li>• Sound work experience in a professional environment.</li> <li>• Excellent communication and written skills with constant awareness of the audience and reputational risk are essential to this role.</li> <li>• Self motivated with the ability to plan and prioritise workload.</li> <li>• Highly organised approach to work and the ability to manage a demanding caseload.</li> <li>• Excellent organisational skills and attention to detail are essential along with the ability to work under pressure and prioritise tasks.</li> <li>• Emotional resilience.</li> </ul>
<b>Essential Key Skills, Qualifications &amp; Experience</b>	<ul style="list-style-type: none"> <li>• GCSE English, Maths or equivalent.</li> <li>• Basic knowledge of legacies</li> <li>• Excellent verbal and written communication skills are required.</li> <li>• Computer literate - preferably with experience of database management systems such as FirstClass, Word, Excel and Google Mail.</li> <li>• Ability to compose and produce both professional and empathetic communications letters</li> <li>• High awareness of reputational issues.</li> <li>• Ability to extract relevant data from correspondence in an accurate and timely manner</li> <li>• Excellent interpersonal skills and the ability to demonstrate tact and diplomacy and to be empathetic. Ability to provide professional, empathetic and confident customer service.</li> <li>• Ability to work individually and as part of a team.</li> </ul>
<b>Desirable Key Skills Qualification &amp; Experience</b>	<ul style="list-style-type: none"> <li>• An ILM Certificate in Charity Legacy Administration Qualification (CiCLA) awarded by the University of Law (can be achieved post appointment)</li> <li>• Have legacy or charity experience and/or .experience of the law concerning areas of Wills, Tax, Trusts, Probate, Property and Charity.</li> </ul>
<b>Personal commitment to:</b>	<ul style="list-style-type: none"> <li>• Adhere to the Society's charitable objectives, which are to promote kindness and prevent or suppress cruelty to animals.</li> <li>• Take care of their own health and safety and that of others who may be affected by their acts and omissions.</li> <li>• Uphold the RSPCA's core values</li> <li>• Cooperate with Society policies and procedures</li> <li>• Understand and comply with any Society Code of Conduct.</li> </ul>
<b>RSPCA Core Values</b>	Our values for our employees, volunteers, trustees, branches and future members of our Community Engagement Programme guide everything that we do.

	<p>They also guide how we work to rescue and care for animals and how we work with individuals, families, communities and other organisations.</p> <p><b>We are compassionate:</b> we care deeply about the lives of animals, we have empathy for people, we act with kindness and consideration at all times</p> <p><b>We are inspirational:</b> we are life changing, we inspire by taking the lead, we speak up when others don't, we take brave decisions, we change animals' lives for the better.</p> <p><b>We are committed:</b> we never give up, we have energy and determination, we rescue animals from cruelty and neglect, giving them new opportunities and supporting others in doing so, and advocate for all animals at risk of harm.</p> <p><b>We are expert:</b> we have expert knowledge which we willingly share, we act on the basis of evidence, we underpin our decisions and actions with science, data and experience.</p> <p><b>We act with integrity:</b> we are honest and trustworthy, we act with integrity, we do what's right.</p>
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Creation and Authorisation		
<i>Statements in this Role Profile are intended to reflect, in general, the duties and responsibilities of the position, but are not to be interpreted as totally inclusive.</i>		
Profile written by:	Role:	Date:
Approved by (operations):	Role:	Date:
Approved by (HR):	Role:	Date:
Date Job last evaluated:		