



## Role Profile

The Role			
Role Title:	Legacy Administration Assistant	Reporting to (job):	Legacy Operations Manager
Legacy job titles covered by this role profile:		Jobs that typically report into this role:	Legacy Operations Officer also reports into the Legacy Operations Manager
Function / Org Unit	Finance, Legacy	Job Number:	
Base and travel	Southwater office, no travel	Band ( <i>to be assigned by Reward</i> )	
Role Dimensions			
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	The role is task based - the role holder must do certain tasks within certain deadlines to support other members of the team.
Working Environment	Office based		
Role Purpose	To provide effective and efficient administrative support to the Legacy case management team, enabling the team to deliver the charity's objectives relating to legacy case management. Capture information to enable financial reporting and analysis of the Society's legacies. 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.
<b>Principal Accountabilities</b>	<p>Administrative duties to support the smooth running of the legacy department, including but not limited to:</p> <ul style="list-style-type: none"> <li>• processing post (including cheque post), this will include scanning post that comes into the department and adding the post to the legacy management system on a daily basis</li> <li>• setting up new cases on case management system (approximately 2,700 new probate notifications a year) - including establishing the Society's entitlement, extracting all other relevant information and to cross reference notifications with other data sources held within the department and Society's supporter database.</li> <li>• answering the department telephone line - respond to general legacy enquiries from Solicitors, Charities, Branches and members of the public (including queries on open cases) such as wording for Will clauses, where to send cheques and who to make them payable</li> <li>• managing the department inbox and actioning emails accordingly</li> <li>• to ensure sensitivity to and awareness of the Charity's reputation and brand in all communications.</li> </ul> <p>The postholder is required to undertake such other relevant duties as may be required by their Manager.</p>
<b>Key Interfaces</b>	<p>Legacy Operations Manager  Legacy Operations Officer  Finance staff - regarding cheque processing  Facilities - regarding access to post / scanning of documents  Solicitors / professionals - regarding legacies  Family / friends of legators - regarding legacies</p>
<b>The Person</b>	
<b>Personal Attributes and Key Competencies</b>	<p>Excellent communication and written skills. Excellent interpersonal skills. Ability to communicate effectively at varying levels. Ability to prioritise a competing workload through good time management skills. Excellent organisational skills and attention to detail are essential along with the ability to work under pressure and prioritise tasks.</p>
<b>Essential Key Skills, Qualifications &amp; Experience</b>	<p>GCSE English, Maths or equivalent.</p>
<b>Desirable Key Skills Qualification &amp; Experience</b>	<p>Work experience in a professional environment.  Empathy with RSPCA's charitable objectives  Comfortable around dogs</p>
<b>Creation and Authorisation</b>	

<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>		
<b>Profile written by:</b> Donna Barclay	<b>Role:</b> Head of Legacy Income	<b>Date:</b> 14/05/21
<b>Approved by (operations):</b>	<b>Role:</b>	<b>Date:</b>
<b>Approved by (HR):</b>	<b>Role:</b>	<b>Date:</b>
<b>Date Job last evaluated:</b>		