



Role Profile

The Role			
Role Title:	Legacy Officer	Reporting to (job):	Senior Legacy Income Manager
Legacy job titles covered by this role profile:		Jobs that typically report into this role:	Legacy Officer
Function / Org Unit	Legacy Income Management	Job Number:	
Base and travel	HQ hybrid no travel	Band (<i>to be assigned by Reward</i>)	
Role Dimensions			
Number of direct reports	0	Manager/Individual Contributor:	
Number of dotted line reports	0	Budget (Operating/Capital)	Budget authorised signatory.
Total No of Reporting Staff (include all direct and indirect reports)	0	Decision Making Authority & Responsibility for Resources	Authority to make decisions with reputational and financial impacts. Works autonomously.
Working Environment			
Role Purpose	To optimise legacy income to the RSPCA and its Branches by the proactive and efficient management of legacy case files. Managing a caseload requires Legacy Officers to manage, protect, optimise and expedite gifts left to the RSPCA and its Branches in Wills.		

	<p>Each Legacy Officer will manage a caseload of residuary and life interest case files. The Legacy Income Management team manages the Society's single biggest income stream (£90m in 2021), accounting for over half of the Society's income.</p>
<p>Principal Accountabilities</p>	<p>Case management</p> <p>Management of a caseload of residuary, trust and contentious cases includes:</p> <ul style="list-style-type: none"> ● proactive involvement in property and other asset sales ● checking, approving or querying Estate Accounts, ensuring correct funds are received and if not, investigating the matter ● checking sometimes complex HMRC tax calculations and optimising income by querying any mistakes. ● management of a small number of estates with foreign assets and foreign estates ● management of a small number of contentious cases or cases where the legacy is at risk while proactively managing the risk and reputational risks involved, under guidance from the Senior Legacy Officers ● identifying, assessing and progressing ex-gratia payments ● management of a caseload of cases where the RSPCA is Executor, Administrator or Trustee, under guidance from the Senior Legacy Officers ● ensuring legacies are correctly allocated in accordance with the wishes expressed in the Will ● management of a large volume of correspondence with a wide variety of stakeholders including executors, solicitors and other charity legacy teams ● deal with legacy cases on behalf of the Society's branches and correspond with and provide advice to branches regarding legacies. ● Ensuring that all incoming correspondence is dealt with in accordance with team KPI's. ● Responding to incoming enquiries by telephone and email, ensuring the appropriate legacy case files are updated accordingly. ● Ensure all open legacy case files are reviewed on a regular basis and appropriate action taken to move cases through to conclusion. ● Process legacy payments to branches ● signing receipts on behalf of the RSPCA ● Recording complete and accurate data promptly in compliance with Charity Commissions SORP and internal policies and procedures ● Identify stories and information which will help the RSPCA promote the benefits of legacy giving <p>Working within the legacy income management team requires:</p>

	<ul style="list-style-type: none"> ● ensuring work is carried out sensitivity with awareness of the Charity's reputation and brand in all communications. ● keeping up to date with sector developments and knowledge of this area including maintaining excellent knowledge of the law relating to Wills & Probate ● to adhere to delegated authority procedures ● to engage with other areas within the RSPCA to raise the profile of legacies ● to become involved in other ad hoc tasks as required
Key Interfaces	Professional executors Lay executors, families and friends of the deceased Trustees, ELT Charity professionals RSPCA staff and Branches Property agents and RSPCA Property team RSPCA Finance team and auditors Instructed solicitors / barristers Gifts in Wills team
The Person	
Personal Attributes and Key Competencies	<ul style="list-style-type: none"> ● Exercise sound professional judgement in decision making, especially where there is a financial implication. ● Self motivated with the ability to work individually and as part of a team. ● Excellent interpersonal skills and the ability to demonstrate tact and diplomacy and to be empathetic. ● Highly organised approach to work and the ability to manage a demanding caseload. ● High awareness of reputational issues.
Essential Key Skills, Qualifications & Experience	<ul style="list-style-type: none"> ● Postgraduate degree or equivalent experience ● Ability to assess risk and profitability. ● Sound and up to date knowledge of the law surrounding probate, tax, Wills and trusts. ● Demonstrable experience of negotiating and advancing persuasive legal arguments. ● Excellent verbal and written communication skills. ● Excellent problem-solving and analytical skills. ● IT Skills ● Highly organised with the ability to effectively manage a very demanding and multi discipline workload.

	<ul style="list-style-type: none"> ● Excellent communication skills, both verbal and written, which are clear, concise and jargon free. ● Demonstrable ability to step back and see the “bigger picture” for the RSPCA. ● Commercial and strategic thinking. ● Demonstrates empathy and the ability to provide guidance and gain confidence and understanding. ● A demonstrable understanding of the principles of good regulation and legal compliance
Desirable Key Skills Qualification & Experience	<ul style="list-style-type: none"> ● Experience of probate and trusts or legacy administration e.g in private practice (solicitors firm or other) or in a charity or other relevant professional workplace. ● IT Skills, preferably with experience of database management systems such as FirstClass, Word, Excel and Google Mail
Personal commitment to:	<ul style="list-style-type: none"> ● Adhere to the Society’s charitable objectives, which are to promote kindness and prevent or suppress cruelty to animals. ● Take care of their own health and safety and that of others who may be affected by their acts and omissions. ● Uphold the RSPCA’s core values ● Cooperate with Society policies and procedures ● Understand and comply with any Society Code of Conduct.
RSPCA Core Values	<p>Our values for our employees, volunteers, trustees, branches and future members of our Community Engagement Programme guide everything that we do.</p> <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>We are compassionate: we care deeply about the lives of animals, we have empathy for people, we act with kindness and consideration at all times</p> <p>We are inspirational: 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>We are committed: 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>

We are expert: 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.

We act with integrity: we are honest and trustworthy, we act with integrity, we do what's right.

Creation and Authorisation

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.

Profile written by: Donna Barclat	Role: Head of Legacy Income Management	Date: 2nd October 2022
Approved by (operations):	Role:	Date:
Approved by (HR):	Role:	Date:
Date Job last evaluated:		