

Vacancy Information Pack



Legacy Management Administrator

Closing date: 28th April 2024



RBL
ROYAL BRITISH LEGION

Thank You

Thank you for your interest in this role at the Royal British Legion. We are currently recruiting for a Legacy Management Administrator, whose core role is to provide administrative support to RBL's Legacy Management Team, as well as having responsibility for your own caseload of pecuniary files (when experience in legacy management has been gained).

We are a busy team, sitting within the Fundraising & Supporter Development department, and we are responsible for bringing in a significant proportion of RBL's income, which contributes to our charity providing vital welfare services and support for the Armed Services Community (circa £25million in legacy income per year).

The Legacy Management Team at RBL are very welcoming, efficient, and highly motivated. You will get to know, and work with, a wide range of colleagues across different teams within the charity, which enables us to provide a valuable service to all our beneficiaries, and of which we are most proud.

If this sounds like an opportunity for you, please read on and consider putting in an application. I look forward to reviewing your experience and motivations, and perhaps meeting you in the coming weeks.

Thank you,

Carol Macey
Senior Legacy Management Officer



Job Description

Job Title: Legacy Management Administrator

Reporting To: Senior Legacy Management Officer

Role Purpose:

To support the Legacy Management Team with administration, financial and database procedures and reporting and to undertake pecuniary legacy casework. To assist in the efficient and proactive management of legacy income to ensure TRBL receives it's full and correct entitlement.

Key Responsibilities:

Administration, financial and database procedures and reporting

- Manage daily post including opening and allocating new cases
- Manage the Book of Remembrance; work with calligrapher to update regularly
- Process and track invoices received by Legacy Admin team; updating FirstClass
- Maintain process manuals relating to administration. • Process and monitor income received by cheque, BACS and reallocation from other sources ensuring Solchar, Care and FirstClass databases are up to date and correct.
- Download weekly Smee&Ford notifications; open and allocate new cases, update Care and FirstClass.
- Update FirstClass with historical Care numbers as required, ensure Care records are updated, accurate and cleansed.
- Review the internal unallocated income report, identifying legacy payments and updating Care and FirstClass.
- Run various housekeeping reports to check for accuracy, completeness and restrictions, highlighting any findings to the Legacy Administration Manager.
- Run expenditure report to ensure accurate processing and allocation of restricted income. Casework
- Manage a caseload of approx. 200 to 300 pecuniary legacy cases maintaining good working relationships with solicitors, executors, co-beneficiaries, family and friends, Legion Branches and other Legion entities.
- Deal with incoming correspondence and enquiries, undertake regular case reviews and update all relevant information in line with Key Performance Indicators.
- Ensure legacies are allocated correctly in accordance with the Will and the law.
- Liaise with internal departments, Branches, Counties, Care Homes and other entities within the Royal British Legion Family regarding restricted legacies.

- Assist case handlers to advise internal departments of restricted fund legacies and ensure they are properly allocated.
- Provide information to the Branch Trust Accountant as and when required.
- Keep up to date with developments in the law relating to the administration of estates, sharing links, articles and seminar presentations with team.

Miscellaneous

- Monitor and manage internal and external enquiries from other teams, supporters, members and the public in relation to legacy administration by phone and email.
- Undertake such other tasks within the Legacy Management team as required

This job description reflects the current scope of duties and responsibilities of the role.

The post holder may be asked, and is expected, to undertake any other duties commensurate to the grade of the post. As duties and responsibilities change and develop, this job description will be reviewed and may be subject to amendment.

General

- To live The Royal British Legion's shared values (Service; Collaboration; Passion; Excellence; Valuing our people) in the way you work and engage with others - the fundamental beliefs and qualities of who we are and what we do.
- To be responsible for your own health and safety and that of your colleagues, enacting Health & Safety at Work Act (1974) and relevant legislation, including reporting any health and safety hazard immediately you become aware of it.
- To uphold the requirements of the General Data Protection Regulations and Data Protection Act 2018.
- To maintain required levels of confidentiality regarding information that you come to possess in the course of your work which is commercially or personally sensitive.
- To be inclusive and equitable in your treatment of any parties you engage with through your duties, upholding RBL's Diversity & Inclusion policy and ensuring that we act as an equal opportunities employer and in accordance with the Equality Act (2010).

Person Specification

Criteria	Essential / Desirable	How to be measured
Knowledge & Experience		
Experience of working in an administrative or secretarial role	D	Application/Interview
Experience of financial or database reports or similar	D	Application/Interview
Skills & Attributes		
Strong IT skills – competent user of MS Office and familiar with in-house database systems	E	Application/Interview
Excellent attention to detail, with the ability to highlight knowledge gaps and potential issues	E	Application/Interview
Good analytical skills and highly numerate	E	Application/Interview
Ability to work independently with minimal supervision	E	Application/Interview
Ability to cope with a high volume of work, which may be variable in nature and increasing in responsibility	E	Application/Interview

During the selection process, we will also use values-based competency assessment to understand your alignment with RBL's values.

Service

We support and serve. We are compassionate. We provide great customer care to all the people who come into contact with us. We are accountable and act with integrity.

Collaboration

We value working together and with partners to achieve shared goals. Through strong communication and support, we build trust with each other and treat everyone with respect and honesty.

Passion

We are passionate about our role and contribution. With a positive outlook we are resilient and committed to our work.

Excellence

We strive to be the best we can. We are effective and efficient. We are bold. We are open to new ideas and approaches, challenge each constructively and are willing to learn.

Valuing our People

We support, encourage and provide opportunities for all our people – ensuring we recognise and value everyone's contribution.

Offer Terms

Work Pattern

35 hours per week, Monday-Friday, 9am-5pm

Location

You will be contracted to our London Hub, Haig House. Under our Future Working framework, there will be some flexibility for working remotely/at home, using our collaboration tools to work with colleagues, but with a minimum expectation of two days/week connecting directly face-to-face with colleagues at the hub.

Compensation

£27,252 to £27,852 (Inclusive of London Supplement)

Employee Benefits

- 28 day's paid holiday per year (plus bank holidays), increasing to 29 days after 2 years and 30 days after 5 years. Plus the ability to buy up to 1 working week of additional leave
- Contributory pension scheme – min 2% employee contribution receives 6% employer contribution up to max of 10% employer contribution matched with 5% employee contribution (until 5 years' service reached, when 14% employer contribution achievable)
- Death-in-service Life Assurance, with a benefit of 3x annual salary
- Employee Assistance Programme
- Season Ticket and Rental Deposit Loan Schemes / Cycle to Work Scheme
- Reward Hub online benefits platform with extensive offers and discounts

Working for RBL

RBL employs c 1,900 people across the country campaigning on behalf of the Armed Forces community, delivering support services to them, leading Remembrance on behalf of the nation, raising funds to support our work and developing and running the organisation and our network of membership branches.

We work collaboratively across our workforce and operate flexible hybrid working practices in our major hub offices, using the latest technology to stay connected with colleagues, members, and beneficiaries. We come together around our common [purpose](#), and our values.

RBL is modernising, and we are ambitious to deliver more for the communities we support. We are becoming a more inclusive, flexible, customer-focused, data-driven, and collaborative organisation. But don't just take our word for it. Read our employee stories [here](#), and about our impact [here](#).

It's therefore an exciting time to be part of both changing the lives of our customers and changing the organisation and its future capacity and capability. This presents considerable opportunities for learning within role, and possibilities for career development...And, of course, the satisfaction that comes with knowing that you are making a real difference to the lives of those who serve/have

served our country, to keep us safe and to protect our democratic freedoms and way of life.

Diversity, Equality and Inclusion

We are committed to building a truly inclusive organisation of diverse people and perspectives.

We actively engage in a programme of work to develop our practices and we have set out [our commitments](#) to realise this ambition. We will keep listening, learning, and sharing our progress and impact.

We are Disability Confident employer, signed up to Race Equality Matters and Pride In Veteran standards.

We guarantee an interview to any applicant who declares a disability or/and are part of Armed Forces community on application and whose application demonstrates that they meet the Essential criteria of the role, as set out in the Person Specification.

How to Apply

Your application should be submitted through our jobs site at [Find A Role | Careers | Royal British Legion](#).

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