# Job Profile

Job Title: Legacy Case Administrator

Directorate: Fundraising, Marketing, Digital and Influencing

Reports To: Senior Legacy Case Officer

Matrix Reporting To: Legacy Case Manager

Disclosure Check Level: None

Date created/last reviewed: November 2024

## Overall Role Purpose

The Legacy Case Administrator helps people with sight loss to live the life they choose by assisting the accurate and efficient administration of legacies in line with legislation, policy and best practice contributing to a high-income source for the Association.

## Key Responsibilities

* Provide administrative support to the Legacy Case Team. The Legacy Case Team deal with Estates once a supporter has passed away and left a gift in their Will, to ensure that Guide Dogs receive their full entitlement as intended by the legator.
* Managing a small caseload of non-contentious pecuniary, specific and residuary legacies with support and supervision provided by Legacy Case Officers.
* Communicate professionally, sensitively and with empathy particularly when in contact with lay executors, bereaved family members and next of kin.
* Ensure all incoming correspondence is uploaded onto legacy case management software accurately and on a timely basis, including the processing of Smee and Ford notifications.
* Manage the allocation of new cases to case handlers in line with policy.
* Ensure that all legacy receipts are recorded on legacy case management software expediently and accurately allocated to the correct case.
* Manage the Legacy Case Team inbox and liaise with the relevant case handlers as required.
* Record and retain all information in accordance with General Data Protection Regulations.
* General administration support as required by the Legacy Case Team.
* Extend legacy knowledge by learning and keeping up to date with changes in probate and other relevant law.

## Breadth/Scope of Accountability

### People Accountability

Number of Direct Reports: None

Number of Indirect Reports: None

Number of Volunteers Supervised: None

### Financial Accountability

Annual Income Accountability: None

Assets Managed: None

Budget Accountability: None

# Application of this Job Profile

All employees are required to carry out other such duties as may reasonably be required to fulfil their role and support functional and organisational objectives.

All employees must also:

* Comply with all organisational policies
* Promote the vision and values of the organisation
* Engage in continuous personal development

This job profile is accurate as at the date shown above. It does not form part of contractual terms and may be varied to reflect or anticipate changes to the role.

# Working at Guide Dogs

As well as other services to enhance the lives of people who are blind and partially sighted, we breed and train guide dogs. Staff and volunteers in all our locations support this work. Therefore, all employees must be comfortable working in environments where dogs may be present.

Guide Dogs is a volunteer-involving organisation and as such all staff are required to support volunteers in their roles. This may or may not mean the direct supervision of volunteers but will require all staff to play a supporting role. From time to time you may be asked to support / volunteer your time at Guide Dogs events that take place outside of normal working hours. All employees will be expected to advocate for Guide Dogs at all times and be a fundraiser.

Guide Dogs is committed to safeguarding and promoting the welfare of all children, young people and vulnerable adults with whom we work. We expect all of our employees and volunteers to demonstrate this commitment.

Guide Dogs will require proof of identity and the right to work in the UK.

# Person Specification

## Education/Qualifications

#### Essential

* Educated to A Level standard or equivalent qualification.

#### Desirable

* Educated to degree level or equivalent qualification.

## Job-Related Experience

#### Essential

* Proven experience of providing administrative support and working as part of a team.

#### Desirable

* Previous experience working as a Legacy Case Administrator and/or working within a Charity, Legal, Financial and/or Fundraising environment.

## Knowledge

#### Essential

* Basic understanding of General Data Protection Regulations (GDPR) and how it applies to the role.

#### Desirable

* Basic understanding or demonstrable ability to learn and understand law pertaining to Wills, Taxation, Probate, Trusts, Property and Charities.
* Basic understanding or demonstrable ability to learn and understand the Institute of Fundraising Code of Practice.

## Skills and Competencies

#### Essential

* Strong Microsoft Office skills with demonstrable ability to use Word, Outlook and Excel.
* High degree of sensitivity and emotional intelligence required to interact appropriately with those who have recently been bereaved.
* Attention to detail.
* High organisational skills with ability to maintain a number of projects simultaneously.
* Excellent interpersonal and communication skills.

#### Desirable

* Prior experience of legacy case management software or equivalent.

## Behaviours

Our behaviours capture the essence of what it is to be Guide Dogs people, whether staff or volunteer. They describe the experience we expect everyone – the people we support, donors, partners, our volunteers and staff – to have while working with us. Guide Dogs people are:

* **Person-centred** - We are a group of people working to help each person affected by sight loss. We listen and recognise that every individual is different in where they have come from and where they’re going. We are open, empathetic and inclusive. We place the person at the centre of every decision.
* **Expert** - We are specialists in what we do. We are committed to excellence and will never stop innovating. We respect our history, but seek out ways to adapt and improve, and are always willing to learn.
* **Optimistic** - We are relentless in our belief that people with vision impairment can lead the life they choose. We are passionate about helping each person, committed to challenging barriers, and proud of who we are and what we achieve.

So, we: -

* **Partner** - We only change lives when we collaborate. We build valued relationships with donors. We work together with our service users and colleagues, volunteers and partners – and our dogs, of course – to deliver great outcomes. We support and develop each other.
* **Lead-by-example** - We can all be a guide. We take the lead and then hand it over, empowering people to make progress independently. We gain trust by having faith in others, and influence by example. We do what we say we will.
* **Engage** - We cannot change lives if we look on from the side-lines. We get involved, take ownership, and feel responsible for all we do, think and say. We celebrate wins big and small, and we hold ourselves and each other to account.

We use competency-based questioning within our recruitment processes to assess the extent to which candidates demonstrate these behaviours – in ways appropriate to this role – in how they are at work and generally as people.

## Safeguarding

If the role does or may involve working with children, young people or vulnerable adults, or supervising those that do, we’ll also be assessing ‘safeguarding competencies’ as part of the process. These are:

* Appropriate motivation to work with vulnerable groups;
* Emotional awareness;
* Working within professional boundaries and self-awareness; and
* Ability to safeguard and promote the welfare of children, young people and adults and protect from harm.

## Mobility

A flexible approach with a willingness to work outside of core hours and away from home when required.

## **Job Group (internal use only)**

This role has been evaluated as a Support Provider, please [follow this link](https://guidedogs.sharepoint.com/%3Aw%3A/g/ES_hkP-6mT5HkPIdVSJhjgABX0S79-IXzzo3zaTw2LoCXg?e=QKC6tk) to view the salary band.