

Role Title

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|--------------------|-------------------------|--------------------------|------------------------------|
| Job Level | Level 4 | Job Reference No: | |
| | | Role review date: | September 2024 |
| Directorate | Marketing & Fundraising | Function | Legacies |
| Service | Legacy Income Team | Reports to: | Senior Legacy Income Manager |

Scale and scope of role

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|--|-----|--|-----|
| Direct reports | 0 | Indirect reports | n/a |
| Budget responsibility/ accountability | n/a | Accountable for other resources | n/a |

In addition to formal line management, as described above, the role will also be informally supervised and directed by managers in other parts of the organisation. This will be explained on appointment and kept under review.

Context

We help anyone, anywhere in the UK and around the world to get the support they need if crisis strikes: connecting human kindness with human crisis.

We enable vulnerable people in the UK and abroad to prepare for and withstand emergencies in their own communities. And when the crisis is over. We help them to recover and move on with their lives.

We are part of the Red Cross and Red Crescent global humanitarian network.

Our Values and Principles

Our values (compassionate, courageous, inclusive and dynamic) underpin everything that we do. As a member of the Red Cross and Red Crescent Movement, the British Red Cross is committed to, and bound by, its **fundamental principles**: humanity, impartiality, neutrality, independence, voluntary service, unity and universality.

Diversity

At the British Red Cross, we are looking for the right people to help us provide support to millions of people affected by crisis. We want our team to reflect the diversity of the communities we serve, offering equal opportunities to everyone regardless of age, disability, gender reassignment, marriage and civil partnerships, pregnancy and maternity, race, religion or belief, sex, or sexual orientation.

Diversity is something we celebrate, and we want you to be able to bring your authentic self to the British Red Cross. We want you to feel that you are in an inclusive environment, and a great position to help us spread the power of kindness.

Purpose of the role

This is a specialist role within the Legacy Income team. You will be an expert in the management of contentious and complex cases and be expected to act as an advisory function to support the team with their contentious matters. You will be confident in your knowledge of contentious probate, happy to work autonomously as well as working with other members of the team to help them progress their own contentious matters.

Another key aspect of the role will be facilitating conversations with other areas of the organisation around implementing a new case management system, FirstClass4. Experience with this software will be important as you will be the main point of contact within the organisation for the external software developers and other key stakeholders internally. You will lead on the team having FirstClass4 implemented successfully by the end of 2025. The tech-enabled change project at British Red Cross is starting in September 2024, it will be reviewing all our current technology and where we might be able to upgrade certain systems. You will be an advocate for FirstClass and have experience in how the system works and how it will benefit our team and organisation. Knowledge of integration between FirstClass and another CRM would be helpful.

You will also be responsible for a caseload of up to 250 residuary cases as well as working on other team projects to help drive efficiency.

This will be a very busy role but you will get to be a part of an innovative team who are continuously striving to be the best.

Key responsibilities

Case management and contentious probate

- You will be able to demonstrate expert technical skills when it comes to managing complex and contentious cases. The ability to identify any financial or reputational risks; know how to mitigate these risks and flag the appropriate action to senior leadership.
- Maintain and develop the contentious section of our procedures manual.
- Take on an advisory function to the legacy officers in the team to assist them with their contentious matters.
- Manage a caseload of 200-250 residuary cases dependent on capacity.
- Deputise for the Senior Legacy Income Manager when necessary.
- Continue to keep up to date on all new and relevant changes to probate and charity law.

Project management and driving efficiency

- In 2025 you will be working on implementing FirstClass4. This role will drive that initiative from within the Legacy Income team.
- You will have a good understanding of how FirstClass4 works and the functionality it has that will benefit our team.
- You will build a good rapport with the developers of FirstClass4 as well as all relevant internal stakeholders who you will work with to progress the project.
- You will work with the Senior Legacy Income Manager to develop and maintain our team's policies and procedures.
- You will support the team with other ongoing projects.

Team Member

- Actively participates in all team meetings.
- Supports other team members
- Works and behaves in accordance with all BRC policies, procedures and in line with our Values in Action.
- Upholds the fundamental principles of the Red Cross and acts with integrity, in accordance with the Society's values (inclusive, compassionate, courageous and dynamics)

The duties and responsibilities described are not a comprehensive list and additional tasks may be assigned from time to time that are in line with the level of the role.

Pre-engagement checks

Criminal Records

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| England and Wales – Disclosure and Barring Service (DBS) |
| • None |
| Scotland |
| • None |
| Northern Ireland |
| • None |

Person Specification

| Requirements | Evidence obtained through Shortlisting (S), Interview (I), Assessment (A) | | |
|--|--|---|----------|
| | S | I | A |
| Knowledge and Skills Up to 10 | | | |
| Essential <ul style="list-style-type: none"> - In-depth knowledge of Legacy Administration, Probate Law, and Contentious probate. - The ability to quickly identify financial and reputational risk. - The ability to convey complex technical matters to other Legacy professionals as well as others who do not have Legacy experience. - Good working knowledge of FirstClass4. - Excellent communication skills. - Project management skills. Desirable <ul style="list-style-type: none"> - Knowledge of how FirstClass4 can integrate with other CRMs. - Understanding reporting functionality on FirstClass4. - Good understanding of Technology used by Legacy professionals. | <ul style="list-style-type: none"> x x x x x x x x | <ul style="list-style-type: none"> x x x | |
| Experience | S | I | A |
| Essential <ul style="list-style-type: none"> - Managing contentious and complex matters independently. - Working within a with a charity Legacy team. - Advising others on contentious case management best practices. - Using FirstClass for Legacy Administration work. - Project management. - Good working relationships with sector solicitors. Desirable <ul style="list-style-type: none"> - Working with IT and Data teams to facilitate the implementation and integration of a new system. | <ul style="list-style-type: none"> x x x x x x x | <ul style="list-style-type: none"> x x | |
| Additional requirements | | | |
| Essential | | | |

| | | | |
|--|--|--|--|
| <ul style="list-style-type: none"> - Ensures inclusive practice, challenges discrimination and promotes diversity in line with our Equality, Diversity and Inclusion (EDI) policy. | | | |
| Values in Action | | | |
| <p>Dynamic - We move forward as one team.</p> <ul style="list-style-type: none"> - Every day, we're adapting, innovating and learning. - When the unexpected happens, we are calm, quick and efficient. - We respond smartly, using clear processes and systems. <p>Compassionate - We stand for kindness.</p> <ul style="list-style-type: none"> - People come first, no matter who or where they are. - We have genuine, open-minded conversations. - Together, we're a united force for good. <p>Inclusive - We are open to all.</p> <ul style="list-style-type: none"> - We treat each other with dignity and respect. - Every person's uniqueness is valued, supported and celebrated. - Our individual backgrounds and experiences make our organisation stronger. <p>Courageous - We are bold.</p> <ul style="list-style-type: none"> - We show our strength by doing the right thing. - We aren't scared to test our creative ideas. - As humanitarians, we go the extra mile to help people in crisis | | | |

We guarantee an interview to disabled candidates (as defined in the 2010 Equality Act), who meet the minimum shortlisting criteria in the advertised person specification and apply under the disability confident scheme.