



**Royal Star  
& Garter**

Care with courage



# Legacy & In Mem Assistant

Candidate information pack





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# Welcome to Royal Star & Garter

We have the privilege of ensuring that the veterans and families we care for and support can lead happy and fulfilled lives. We currently run three Homes and have also launched new services reaching out into the community, including Day Care, Lunch Clubs and a free to access Telephone Friendship Service.

We are looking for someone committed to making a difference to our work and interested in developing a career in legacy case management and in memory giving. We are looking for an individual with some of the key skills and some related experience, but we are also committed to supporting learning and development in the role. This person will be part of a small but high performing team generating significant fundraising revenue from legacies and in-mem giving. You must be able to demonstrate that you have good experience of delivering customer care and that you are comfortable working with a range of stakeholders while operating in a digital world.

We are looking for someone who shares our values and is confident in demonstrating them through the quality of their work. Many of our processes are going through change as we move our working practice to be fully digital and we are looking for someone who has the energy and flair for contributing to this. Equally they must possess the ability to show compassion and sensitivity when dealing with bereaved family members.

If this is you, then we look forward to receiving your application. Thank you for your interest.

Caley Eldred  
Director of Supporter Engagement

## The role at a glance

Title: Legacy & In Mem Assistant

Location: Hybrid working with a minimum of one day per week in our Hampton Office

Reports to: Legacy Manager

Hours: 21 hours per week

Salary: £18,500

**Closing date: Friday 31st Jan 25**

# Job description

Purpose

1. To directly support the legacy team in all aspects of case management
2. To effectively manage the day-to-day administration of all in memory giving including donor communications and recognition to optimise funds from this income stream
3. To provide excellent donor care, with a focus on establishing long term relationships to support donor engagement
4. To maintain accurate records on all systems and databases.

Key responsibilities

## **In Memory**

- Provide first point of contact and ongoing (sensitive) communications for all In Memory supporters, family members and funeral directors including acknowledging donations
- Accurate recording of all income, reconciling digital and offline gifts and providing memorial fund updates
- Maximise in memory income through Gift Aid collection, encouraging repeat giving and providing excellent supporter care
- Support families where appropriate with recognition of gifts with a focus on driving them towards our online option
- Ensure efficient In Mem administration, suggesting improvements to systems
- To work effectively with the Marcomms team and assist in the development of related marketing and donor care materials including online content and the Tribute Funds platform.



# Job description - continued

## Legacy

- Record new notifications of legacy gifts from the Smee & Ford notification service, solicitors and lay executors
- Ensure accurate and efficient updating of the legacy (First Class) and supporter (Donorfy) databases, together with maintaining legacy management and in memory reporting systems
- Support the administration of legacy cases, including responding to routine correspondence, acknowledging, processing and recording income and maintaining up to date records
- Efficiently manage an active caseload (primarily pecuniary) taking appropriate steps to ensure income optimisation.

## General

- Work with the Finance team to ensure income reconciliation and recognition of restricted funds.
- Promote and deliver the highest standards of care, respect and support to donors, colleagues and others
- Undertake other duties as may be required and which are consistent with the nature of this role.

## To apply

Send your CV and a covering letter (no more than two sides) outlining how you meet the person specification and what you will bring to the role to:

[ajla.dizdarevic@starandgarter.org](mailto:ajla.dizdarevic@starandgarter.org)

If you would like a conversation about what the role entails please contact:

[jenny.franzmann@starandgarter.org](mailto:jenny.franzmann@starandgarter.org)

# Person specification

## **Experience:**

- Excellent customer care, ideally delivered in a charity/care setting although we welcome candidates with other relevant experience
- Able to carry out detailed work accurately, including the management of sensitive and confidential data
- Experience of managing a range of stakeholder relationships including donors, suppliers and professionals
- Ability to prioritise workloads and manage multiple tasks whilst operating in a hybrid working environment.

## **Skills:**

- Confident communicator with the required emotional intelligence to deliver key tasks effectively across a range of mediums and with a range of stakeholders
- Numerate with a good understanding of financial information and ability to analyse data
- Fully computer literate, working with the range of MS products within the 365/Teams environment and skilled in remote working practices.





# Person specification - continued

## **Personal behaviours/characteristics should include:**

- Self-starter who is an independent thinker
- Enjoys and embraces the opportunity for change, particularly working in a digital environment
- Able to manage own priorities as noted in a hybrid environment
- Commitment to our values, modelling those in all aspects of work

**We reserve the right to update and amend this job description to ensure it accurately reflects the role.**

**This will be agreed in consultation with the job holder.**



# Conditions of employment

Any offer of employment made will be subject to the following conditions:

- Satisfactory references including one from your current or most recent employer
- A pre-employment medical questionnaire
- Enhanced DBS Disclosure
- Proof of the Right to Work in the UK.

# Offer



## Although we are a charity, we offer a generous package

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- Salary £18,500 (21 hours)
- 25 days holiday per annum plus bank holidays (pro rata applies for part time hours)
- Employer pension contribution of 7.5% with matching employee contribution of 5%
- Life insurance of 3 x salary (until age 70)
- Two months full occupational sick pay, one month half pay before statutory sick pay
- Access to appropriate professional bodies after six months of employment
- Learning and development – opportunities to support you in your role



## Our values



## With love



We carry out our work with love, care and compassion.

## Living positively



We are optimistic in everything we do, supporting veterans and their partners in leading happy, fulfilled lives.

## As a family



We work and live as one team, one family, one community.

## Standing in their shoes



We show admiration and respect for people and never forget what they have done.

## Take courage



We are not afraid to do what is right and what is needed.

# About us



## Our vision

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A future where veterans and their families live well.

**Mission:** To provide outstanding care and support that recognises the needs of veterans and their families.

## Our care

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We provide loving, compassionate care to veterans and their partners who live with disability or dementia. Our Homes in Solihull, Surbiton and High Wycombe offer specialist residential long and short break care. In addition, we are developing a range of services to help us reach the wider military community including Lunch Clubs, Day Care and a Telephone Friendship Service.