

Job Description

Job Title: Legacy & In Mem Assistant
Location: Hampton
Reports to: Legacy & In mem Officer
Terms: Salary: £25k pro rata, part time - 21 hours per week

Main purpose of the job

1. To directly support the legacy team in all aspects of case administration
2. To manage the day to day administration of all in memory giving including donor communications and recognition
3. To provide excellent donor care, with a focus on long term relationship management
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
- Ensure efficient In Mem administration, suggesting improvements to systems
- Work with the Marcomms team to ensure the effective marketing of In Mem giving with a focus on Royal Star & Garter literature.

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 (Raiser's Edge) databases, together with maintaining legacy administration and reporting systems
- Support the administration of legacy cases, including responding to routine correspondence, acknowledging, processing and recording income and maintaining up to date files
- Support in-house legacy mailings, completing legacy pledger returns and sending acknowledgements

- Assist with the administration of the free will referral process
- To assist in the development of related marketing materials.

General

- Managing new (resident) admission details, death notifications and occupancy lists
- Maintain the online memorial wall ensuring all legacy and in memory donors are recognised and provide support to family members to create personalised pages
- Work with the Finance team to ensure income reconciliation and recognition of restricted funds.

Other

- 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.

Person Specification

Skills and experience:

- Customer care experience with the confidence to communicate sympathetically and effectively in writing, on the phone and with people on a face to face basis
- Experience of carrying out detailed work accurately, with the ability to manage sensitive and confidential data
- Some experience of working in an office environment
- Experience of managing supplier relationships
- Ability to prioritise workloads and manage multiple tasks from a range of people
- Computer literate, confident with excel, word, email, power point and using databases
- Numerate with a good understanding of financial information and ability to analyse data

Behaviours/characteristics:

- Self-starter who is an independent thinker
- Able manage own priorities
- Role model our values in all aspects of work
- High level of attention detail

We are a values based organisation and strive to demonstrate this in all we do:

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 and 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's right and what is needed

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 and where possible we would hope to achieve mutual agreement to any reasonable changes.