## Liverpool Charity and Voluntary Services

## Job Description

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| **Department** | Charity Services |
| **Job Title** | Donor & Trust Support Executive |
| **Salary** | £28K FTE (14 hours per week) |
| **Accountable to** | Director of Finance & Resources |
| **Staff Responsible for** | None |
| **Main working contacts** | LCVS Finance Manager, Charity Services customers, and grant applicants, related governance committees, legal, investment and financial advisors. |

### Main Purpose of Post:

To be the main point of contact with donors and maintain and develop their relationship with LCVS

To co-ordinate Trust management and support grants administration service.

To ensure that the risk and compliance requirements relating to Charity Services clients and the subsidiary payroll giving service are operated.

To develop products and services to meet the customer service requirements and aspirations.

### Main Responsibilities

#### Administration

Reviewing, developing and maintaining the client administration systems for charitable trusts, client accounts and payroll giving.

Providing timely and accurate information to customers and trustees and ensuring legal and accounting compliance subject to scrutiny by the Finance Manager / Director of Finance and Resources.

Promoting prompt and efficient customer service through a range of communication channels to ensure efficient and accurate responses and to consolidate good practice through an effective quality control system.

##### Customer Service

Structuring services to meet the individual requirements of major clients.

Providing specialist charitable giving and grant making advice to donors.

Co-ordinating and supporting the Trust management service including servicing and attending Trust meetings.

Contributing to the development of appropriate information and publicity for marketing Services

#### Risk and Compliance

Maintaining knowledge on developments relating to charity, tax and trust law and to advise colleagues and Trustees on the impact these may have on Services.

Working with the Finance Manager to implement changes to working practices to conform to changes in legislation, regulation and guidance.

Working with the Finance Manager and Director of Finance and Resources to implement and operate risk management and compliance procedures.

### General

To work as part of the team with other staff at LCVS.

To implement and follow LCVS policies and procedures.

To maintain accurate records of in the various media specified for your areas of responsibility.

To undertake any training necessary and participate in the organisation’s supervision and appraisal system, and identify further training and personal development needs.

To represent LCVS and undertake other tasks in support of the organisation as required by your line manager.

The post holder is expected to be flexible in the performance of duties and to undertake any other duties identified as appropriate to the post.

### Equal Opportunities

LCVS is committed to equal opportunities, anti-discrimination and anti-oppressive policy and practice. No one we have contact with may be discriminated against either directly or indirectly on the grounds of gender, race, nationality, religion, cultural group, marital status, sexual orientation, age, or impairment. The policies apply to job applicants, employees, volunteers, users and beneficiaries of our services.

### Job Description

All jobs are subject to change from time to time and this job description will be reviewed regularly.

This job description is a guide to the work you will be required to undertake and represents a range of responsibilities commensurate with the grade for the post**.**

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| **Prepared by:** | Director of Finance and Resources |
| **Date:** | 2 February 2022 |

### Person Specification

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| **KEY:** E= Essential D= Desirable A= application I = interview R= references P= Practical **S**= Short listing criteria | | |
| Requirement | Essential/Desirable | **Assess from:** |
| Qualifications |  |  |
| Education to degree level or equivalent. | E | A **S** |
| A recognised qualification in finance and/or administration | D | A, I |
| Knowledge |  |  |
| Good working knowledge of voluntary sector and issues around charitable giving. | E | A **S**, I |
| Understanding of Tax efficient discretionary giving schemes | E | P, I |
| Understanding of Trust law and constitutions. | E | P, I |
| Rules governing personal, corporate and charity taxation | D | P, I |
| Computer literate with experience of Microsoft Office. | E | A, I |
| **Skills** |  |  |
| Able to manage customer relationships with tact and knowledge | E | P, I |
| Able to lead, motivate and manage staff | E | I |
| Good interpersonal and written and oral communication skills. | E | I, P |
| High degree of analytical and numerate skills | E | A,I,P |
| **Experience** |  |  |
| The management and administration of Trusts | E | A |
| Experience of dealing with donors to charity | E | A, I |
| Charity investment management | D | A, I |
| Supporting boards of trustees or committees | E | A, I |
| **Personal Attributes** |  |  |
| Committed to equal opportunities, anti-discrimination, anti-oppressive policy and practice and social inclusion | E | A **S**, I, R |
| Committed to the work of the charitable sector | E | A I, R |
| Able to work as part of a team and on own initiative. | E | I, R |
| Enthusiastic and self motivated | E | A, I, R |
| Ability to work sensitively with people of differing viewpoints. | E | P, I, R |
| Ability and willingness to work flexibly including some evening work. | E | I |
| Able to travel in course of carrying out duties | D | I |