



Trust Administration Officer Recruitment

Thank you for your interest in the post of Trust Administration Officer at Charity Link. Please find enclosed the job description.

CVs should be received by us no later than 5pm on Thursday 31st August 2023, and can either be posted to the address below, marked "Private & Confidential", for the attention of the Chief Executive Officer, or emailed to susan.mceniff@charity-link.org.

We intend to interview for the post, week commencing 18th September 2023. If you will be unavailable for interview during this week, I should be grateful if you could advise us of this when you submit your application.

Yours sincerely

Susan McEniff

Chief Executive Officer

CHARITY LINK - JOB DESCRIPTION

TRUST ADMINISTRATION OFFICER

Job Title:	Trust Administration Officer	Department:	Trust Administration
Reports to:	Deputy CEO	Responsible for:	None

1. Purpose of Job

- 1.1 To administer a portfolio of charitable trusts
- 1.2 To grow and develop the portfolio of charitable trusts
- 1.3 To ensure the smooth running of the Trust Administration Service
- 1.4 To provide advice to Trustees on the governance and regulation of charities
- 1.5 To ensure that the trusts maintain their contractual and regulatory compliance
- 1.6 To maintain the good governance of the charities under your administration

2. Main Responsibilities

- 2.1 Organise meetings of the Boards of Trustees of charitable trusts
- 2.2 Prepare and distribute papers and reports for Trustee meetings
- 2.3 Attend Trustee meetings and take minutes
- 2.4 Assess applications from other charities to the Small Grants Scheme
- 2.5 Process grant applications to the trusts and make payment of awards when agreed upon
- 2.6 Act on other instructions given by the Trustees and actions arising from meetings as appropriate
- 2.7 Complete annual returns to regulatory bodies
- 2.8 Maintain a good knowledge of the regulatory frameworks for charities and any relevant legislative changes
- 2.9 Maintain an overview of governing documents and policy documents and support Trustees with the review of these as necessary
- 2.10 Financial monitoring/reporting to Trustees, in conjunction with the Finance Team
- 2.11 Liaison with the auditors or independent examiners of the trusts
- 2.12 Liaison with investment managers and banks/financial institutions on behalf of the Trustees
- 2.13 Administer the recruitment, appointment and induction of Trustees
- 2.14 Deputise for other members of the Trust Administration Service in their absence
- 2.15 Any other duties involved in the operation and governance of the trusts

3. Key Activities

- 3.1 Devising and maintaining administrative systems to manage a portfolio of charity clients
- 3.2 Preparing written grant reports and presenting these to Trustees
- 3.3 Monitoring budgets and forecasting income for the charities in your portfolio
- 3.4 Compiling statistical data and other management information as required; research and information gathering as necessary
- 3.5 Providing good practice and regulatory guidance to Trustees
- 3.6 Assisting Trustees to review and update policy and governing documents as required; advising on the development of new policies and procedures

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- 3.7 Managing Trustee terms of office supporting the recruitment of new Trustees; compiling and issuing Trustee induction packs
- 3.8 Liaising with Trustees and other partners and stakeholders by telephone, email and letter
- 3.9 Liaison with charity service users and beneficiaries (including vulnerable individuals and other charities) as required
- 3.10 Managing relationships and correspondence with banks and investment managers and maintaining records and bank mandates
- 3.11 Processing payments, monitoring expenditure and working with the Finance Team to ensure audit records are maintained
- 3.12 Compiling audit files and supporting the preparation of annual accounts; liaising with the Finance Team, accountants and auditors/independent examiners to complete the annual accounts; preparing Trustees' annual reports; completing annual returns to the Charity Commission and other regulators
- 3.13 Organising and facilitating meetings and preparing agendas; occasionally co-ordinating and participating in other events relating to the administration of the trusts or the Trust Administration Service
- 3.14 Attending Trustee meetings in person and/or online, including some evening meetings
- 3.15 Writing clear and concise minutes, identifying and following up on the actions arising from meetings
- 3.16 Compiling, collating and circulating meeting papers and reports in good time
- 3.17 Dealing with day-to-day correspondence and enquiries for the charities by phone, post and email
- 3.18 Assisting with preparing, maintaining and distributing promotional, information and grant application materials, including web pages as appropriate, for the trusts and the Trust Administration service
- 3.19 Use of Microsoft Word, Excel and other software necessary to carry out the duties of the post
- 3.20 Photocopying, filing, emailing and letter writing
- 3.21 Any other duties of a similar nature which may, from time to time, be required
- 3.22 This job description indicates the main areas of activity of the post. From time to time, however, other tasks and duties may be required but these will fall within the general area of responsibility of the post. Any changes which are of a permanent nature will, following consultation with you, be included in the job description in specific terms and will be formally issued to you.

4. Skills/Attributes

- 4.1 Experience of working within a charitable or government/legal services environment (essential)
- 4.2 Excellent organisational and time management skills (essential)
- 4.3 Able to achieve targets and work to tight deadlines (essential)
- 4.4 Resourcefulness and the ability to use initiative (essential)
- 4.5 Excellent written and oral communications skills (essential)
- 4.6 Excellent interpersonal skills (essential)
- 4.7 Good literacy and numeracy skills, including the ability to compile written and financial reports (essential)
- 4.8 Ability to liaise effectively with individuals and agencies in the private, public and voluntary sectors, and with government departments (essential)
- 4.9 Ability to make decisions, prioritise and delegate effectively (essential)
- 4.10 Creative self-starter and able to work as part of a team (essential)
- 4.11 Good general office experience (essential)

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- 4.12 Able to do occasional work in the evenings (essential)
- 4.13 Sensitivity to the needs of service users and the confidential nature of the work of the service (essential)
- 4.14 Understanding of and commitment to the principles of equality, diversity and inclusion (essential)
- 4.15 Understanding of the charitable/voluntary sector (essential)

5. Qualifications and Experience

- 5.1 Experience of the regulatory framework of companies, charities and social housing (desirable)
- 5.2 Experience of governance (desirable)
- 5.3 Experience of trust administration (desirable)
- 5.4 Experience of charitable grant making (desirable)
- 5.5 Familiarity with Word, Excel and Outlook software packages (essential)
- 5.6 Familiarity with other software, or equipment, necessary to the smooth operation of the organisation (desirable – training will be given)
- 5.7 Experience of working with Boards and/or Committees (desirable)