# Job Description & Person Specification

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| **Job Title:**   |   | Charities Assistant  |
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| **Contract:**  |  | Permanent  |
| **Hours:**  |  |  Part time 21 (0.6) or 28 (0.8) hours a week  |
| **Salary:**   |  | FTE £30,429, per annum. Actual pro-rata salary for 28 hours (0.8) is £24,343.20 and for 21 Hours (0.6) is £18,257.40 per annum. |
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| **Location:**   |  | London, EC1N  |
| **Reports to:**  | Charities Officer  |

## About The Chartered Governance Institute UK and Ireland

The Chartered Governance Institute, UK and Ireland is the qualifying and membership body for governance with 130 years’ experience of educating and supporting governance professionals. It has in excess of 34,000 students and members worldwide and provides professional development, guidance, career opportunities and thought leadership for the governance profession.  The Chartered Governance Institute, UK and Ireland is the largest division within the group.

## About The Chartered Secretaries’ Charitable Trust

Registered charity no. 1152784. Company registration no. 8602517.

The Chartered Secretaries’ Charitable Trust is by the side of chartered secretaries and their families through life’s challenges, by supporting them when in need and by promoting excellence in governance. The Trust:

* serves members, graduates, students and employees of The Chartered Governance Institute and their families, to relieve and help prevent financial difficulties,
* facilitates research to increase good governance for the benefit of the public and encourages the expertise of those in the field of governance with bursaries and prizes.

**Purpose of the role**

To assist the Charities Officer with the administration of The Chartered Secretaries’ Charitable Trust.

## Responsibilities

To assist with all administrative duties and with delegated lead responsibility as appropriate, to include:

* Delivery of high quality Gift Aid support including Gift Aid claims to HMRC along with administration of legacies.
* Management of donation recognition and reconciliation, and support with report requirements of investment valuations.

* Processing as appropriate of supplier invoices, payments to beneficiaries and reimbursement of committee and visitor expenses.

* Correspond by email, post and telephone with beneficiaries, Trustees, committee members and visitors.

* Preparing papers on beneficiaries’ circumstances for consideration of the Support and Grants Committee or the Chairman of the Support and Grants Committee and preparing papers for consideration of Trustees for applications for the charity certificate bursary.
* Organisation and planning for committee meetings, the biennial event for volunteers and of visits to beneficiaries.

* Attendance, as required, at meetings of the Board of Trustees and the Support and Grants Committee.
* Maintenance of records held digitally or on file, including interrogation, analysis, and presentation of data to the Trustees and the Support and Grants Committee.

* Promotion of the volunteer visitor scheme to CGIUKI members and of the support available from the Trust to potential beneficiaries, including project management of marketing and website initiatives in collaboration with the Institute.

* Development of operational procedures and policies, including liaison across the Institute*.*
* Preparing papers as required for consideration by Trustees and the Support and Grants Committee.

* Review and maintenance of the risk register.

* Review of budget, forecasting and financial requirements.

* Carry out any other duties commensurate with the post which are deemed appropriate.
* To deputise for the Charities Officer in all matters as required, requiring an understanding of the responsibilities of the full role of Charities Officer to step forward in any absence.

# Person Specification

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| **Knowledge**  | **Desirable** * All aspects of Gift Aid including claims to HMRC.
* Fundraising regulations.
* Charity and Company legislation.
* Welfare benefits.
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| **Experience**  | **Desirable*** An understanding of data protection and Gift Aid rules and regulations.

Studying, working/volunteering for a benevolent or other registered charity. |
| **Skills**  |  **Essential** * Microsoft office, including Access or other databases.
* Attention to detail with the ability to collect data and/or financial information, analyse findings and present recommendations.
* Good interpersonal and relationship building skills.
* Excellent communication skills (written and verbal) and ability to operate at all levels.
* Organisational skills of events, information or people management, including the ability to work unsupervised.

Desirable * Experience of Xero software

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| **Behaviours**  | * Keen interest to increase knowledge of charity governance and administration and to learn new skills.
* Flexibility to juggle varied tasks and complete within deadlines, while maintaining attention to detail.
* Empathy with individuals in need while remaining non-judgemental and impartial.
* Upholding confidentiality and discretion in all Trust matters, specifically with regard to the circumstances of beneficiaries.
* Can act in accordance with CGIUKI values:
* Openness
* Integrity
* Authority.

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| **Special circumstances**  | * Some flexible hours and travel required on occasion.
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**Instructions to apply**

Applications should be in the form of a full CV and supporting letter outlining how your skills and experience meet the person specification for the post. Please submit your applications by e-mail to

csct@cgi.org.uk **Closing Date: 3rd December 2024 at midnight**