Cumbria Community Foundation

Job Description

**Title**: Development Assistant

**Employer**: Cumbria Community Foundation

**Reporting to**: The Chief Executive

**Responsible for:** NA

**Terms:** 37.5 hours/week

**About the Community Foundation and Role**

The primary objective of the Community Foundation is to address disadvantage. It does this by making effective grants to individuals and organisations on behalf of its donors and fundholders.

The Community Foundation provides high quality philanthropic services (grant making) to a wide range of public, corporate and individual donors. It has built its long-term funds to almost £19m and distributes in excess of £2m pa to local community groups and individuals.

To assist in addressing significant needs in our county we have set ambitious business plan targets to grow the Foundation’s invested and flow through grant making funds from £15m, and £1.4m pa in 2017 to £30m and £2.8m pa in 2022. To meet these targets, we have a comprehensive Development Plan. It is the responsibility of the Development team comprising the Chief Executive, Philanthropy Officer and Development Assistant and the Foundation’s trustees to meet these targets.

**Overall Job Purpose**

This role underpins the work of the Development team, undertaking research, managing data, providing information and practical support to staff and trustees.

The role also includes event organisation, significant project work (set out below) and lead responsibility for relations with professional advisers (solicitors, accountants and financial advisers).

The Development Assistant works with and supports the Chief Executive and the Philanthropy Officer plus a core group of trustees.

This is a fascinating and rewarding role which contributes significantly to the planning and coordination of development activities and involves the Development Assistant becoming fully familiar with the people and organisations with whom the Foundation is building relationships.

**Information Systems and Research**

* Manage the Customer Relationship Management (CRM) aspects of the D2 (Salesforce) database to ensure it provides timely and accurate information in support of Development.
* Ensure all data is managed in accordance with the Foundation’s data protection policy and in accordance with data protection legislation.
* Research potential donors and produce briefing materials as required.
* Research and analyse donors’ interests and giving trends and generate information to inform Development activities.

**Events**

* Ensure the effective delivery of our programme of events as a means of securing new donors and donations linked to the wider Development Plan targets. These events include: The Annual General Meeting, Annual Dinner and fund holder receptions.

**Professional Advisers**

* Develop effective and positive relationship with professional advisers (solicitors, accountants, financial advisers etc) in the county in support of securing client referrals, event and programme sponsorship, legacy commitments and the transfer of small, dormant and active charitable trusts.
* Be the point of contact for the UKCF dormant trusts initiative.

**Project & General Support**

* Work with the chair of the Foundation’s Cumbrians in London initiative, preparing committee agendas and papers and contributing to strategy development.
* Proof-read key documents and contribute to web content, newsletters and other publications.

**Direct Support Responsibilities**

Administrative support to the Chief Executive including:

* Preparation of papers and minute taking for Development Committee meetings.
* Preparation of papers and minute taking for Development team meetings.
* Drafting letters, arranging meetings and diary management for the Chief Executive.
* Monitoring and reporting on approaches to prospects.
* Preparation of presentations and written material in support of bids and proposals to potential donors.
* Manage membership renewals and provide content for members only newsletter.
* Ensure donations receive appropriate thank you and acknowledgement.

**General Duties**

* Develop and maintain effective communications with other members of staff and trustees.

**Continuous Personal Development**

Work with the Chief Executive to identify areas for further training and development, undertaking relevant courses and qualifications as required.

* Keep abreast of developments across the charity sector by liaising with senior staff in other charities. Where appropriate, attend external seminars and workshops on behalf of the Foundation.

**Health and Safety**

The post holder is required to carry out the duties in accordance with the Foundation’s Health and Safety policies and procedures.

**Diversity**

The post holder is required to have due regard to equal opportunities at all times, and to work in a fair and reasonable manner towards all people, ensuring service standards are maintained for all cultures.

**Quality**

To support the Foundation in striving to create a culture with total commitment to quality.

 **Person Specification**

|  |  |
| --- | --- |
| **Skills & Abilities** |  |
| **Essential** | **Desirable** |
| * Ability to manage and interrogate databases and produce high quality and informative reports.
* Advanced computer skills, to include Word, Excel and Customer Relations databases
* Ability to draft professional documents
* Understanding of the importance of customer service and teamwork in promoting a positive image of the organisation
* Ability to work under own initiative to broadly agreed guidelines
* Excellent communication skills and the ability to work across all levels of the organisation
* Excellent organisational and time management skills, to manage a heavy workload and deal with competing priorities
* Flexible and adaptable approach to working hours and job tasks
* Research and analyse donors’ interests and giving trends and generate information to inform Development activities
 | * Experience in developing and managing commercial CRM databases.
* Experience of managing events
* Understanding of the charitable/ Not For Profit sector
 |
| **Education**  |  |
| **Essential** | **Desirable** |
| * 5 GCSE passes or equivalent especially in English
 | * First degree or higher degree in appropriate subject
* Recognised IT /CRM qualification
 |
| **Experience** |  |
| **Essential** | **Desirable** |
| * High level administrative and/or personal assistant
* Experience of information gathering, researching, and analysing written and numerical information and customer relationship skills
* Experience of working with confidential material
 | * Experience of working in a multi stakeholder environment and able to work with a wide range of partners with differing priorities and backgrounds.
* Experience of working in a high end sales environment.
* Experience of working with professional people such as solicitors, accountants etc
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| **Personal Attributes** |  |
| **Essential** | **Desirable** |
| * A desire to understand the Foundation, its mission and values
* Hard working and confident with excellent attention to detail
* Ability to cope with the challenges of this role
* Capable, flexible, motivated and an experienced team member and team player
* Enthusiastic and approachable
* Quick learner with an openness to new ideas
* Resilient, calm and professional under pressure
* Tactful, diplomatic and assertive when dealing with challenging situations.
 | A good sense of humour |