Cumbria Community Foundation

Job Description

**Title**: Development Assistant

**Employer**: Cumbria Community Foundation

**Reporting to**: Head of Development

**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 to a wide range of public, corporate and individual donors. It has built its long-term funds to over £23 million and distributed over £50 million since 1999 to local community groups and individuals. £5 million of that £50 million has been distributed in the last year alone as the COVID-19 pandemic has exacerbated the disadvantage of vulnerable people in Cumbria.

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, Head of Development and Development Assistant, and the Foundation’s trustees, to meet these targets. More information on the Foundation can be found at www.cumbriafoundation.org.

**Overall Job Purpose**

This role underpins the work of the Development team; undertaking research, managing data, running online and in-person events, project work, and providing information and practical support to staff and 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 the Development team’s donor pipeline.
* Ensure all data is managed in accordance with the Foundation’s data protection policy and in accordance with all relevant 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 online and in person events as a means of securing new donors and donations linked to the wider Development Plan targets. These events include: the Annual General Meeting, the Annual Dinner/Showcase plus online and (when COVID-19 restrictions relax) in-person events that inform and engage current fundholders and prospective donors.

**Project & General Support**

* Work with the chair of the Foundation’s Cumbria Club initiative, preparing committee agendas and minutes, and overseeing the organising of Cumbria Club events.
* Be the point of contact for the UKCF dormant trusts initiative as well as pursuing dormant trusts identified through the Development team’s contacts with professional advisers.
* Lead responsibility for the Foundation’s membership programme, ensuring subscriptions are up to date and acknowledged, seeking opportunities to promote new membership wherever possible and escalate current members to fundholders where appropriate, and making contributions to the members only newsletter.
* Taking a turn on the Foundation switchboard during busy periods eg annual Winter Warmth Appeal.
* Ensuring all donations receive appropriate thank you and acknowledgement.
* Any other ad hoc tasks that may arise that will contribute to achieving the aims of the Development Team plan.

**Direct Support Responsibilities**

Administrative support to the Chief Executive and Head of Development including:

* Preparation of papers and minute taking for Development Committee meetings, Development team meetings and Cumbria Club meetings
* Drafting letters, arranging meetings and diary management for the Chief Executive and on occasion for the Head of Development.
* Monitoring and reporting on approaches to prospects.
* Preparation of presentations and written material in support of bids and proposals to potential donors.

**Continuous Personal Development**

Work with the Head of Development 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 relevant staff in other Community Foundations and 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.

**Quality**

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

 **Person Specification**

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| **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
* Excellent communication, teamworking, networking and customer service skills
* Ability and confidence to work under own initiative to broadly agreed guidelines
* 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 (occasional out of hours working to manage events)
* Research and analytical skills
 | * Experience in developing and managing commercial CRM databases, particularly Salesforce.
* Experience of managing events in-person and online, using Eventbrite and Zoom and/or other webinar platforms
* Understanding of the charitable/ Not For Profit sector
* Experienced and confident on all social media platforms
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| **Education**  |  |
| **Essential** | **Desirable** |
| * 5 GCSE passes or equivalent especially in English
 | * First degree or higher degree in appropriate subject
* Recognised IT /CRM qualification
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| **Experience** |  |
| **Essential** | **Desirable** |
| * High level administrative and/or personal assistant
* Experience of information gathering, researching, and analysing written and numerical information
* 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 self-starter willing to take responsibility for own time management and workload.
* Hard working and confident with excellent attention to detail
* A desire to understand the Foundation, its mission and values.
* Capable, flexible, motivated and an experienced team member and team player
* Enthusiastic and approachable, and willing to engage with potential donors
* 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 |