



FINANCE ADMINISTRATOR

RECRUITMENT PACK

Dovenby Hall
Cockermouth, CA13 0PN



CUMBRIA
COMMUNITY FOUNDATION

www.cumbriafoundation.org

ABOUT US

While Cumbria has many positive attributes, it also features great inequality, with many vulnerable and isolated communities, extreme child poverty, youth unemployment and associated mental health issues. These needs are often unseen but are very real.

Cumbria Community Foundation is an independent charity that connects people who care with causes that matter. We exist to tackle poverty and disadvantage and to strengthen Cumbria's communities by inspiring philanthropic giving and by making lifechanging grants.

Our aim is to change people's lives for the better by helping local communities. We want Cumbria to be a great place to live for everyone - a place where people work together to address disadvantage.

We are one of Cumbria's foremost grant makers with an average annual grant distribution of £2m and endowed assets in excess of £27m. Donors trust our expertise to direct funds to those grassroots organisations and initiatives that make a big difference to the lives of those in genuine need, reaching vital projects that might not otherwise survive.

Since 1999, we have awarded more than £60m in grant aid and currently manage more than 100 grant making funds. We have funded over 4,000 organisations and 8,000 individuals.

Our grant making priorities are:

- Improving the lives of disadvantaged children and young people
- Improving the life skills, education, employability and enterprise of disadvantaged people
- Supporting vulnerable older people
- Improving the health and wellbeing of people
- Strengthening and supporting fragile communities

Our fundholders, donors and supporters benefit from our in-depth knowledge of Cumbrian communities and organisations. We work with partners, funders and stakeholders to co-design programmatic approaches to address community needs and to secure additional funding.

We have an aspiration to develop our expertise and knowledge to address health inequalities in Cumbria and increase our grant making to deliver impactful, local solutions.



JOB DESCRIPTION



Job Title:	Finance Administrator
Employer:	Cumbria Community Foundation (CCF)
Hours:	22.5 hours/week (hours are negotiable)
Salary:	Up to £26,000 FTE subject to experience
Location:	Our office is based at Dovenby Hall (1st floor), Dovenby, Cockermouth, CA13 0PN. We operate both a flexible and home working policy, which includes an ability to work partially from home.
Contract:	This position is offered as a permanent contract.
Pension:	After the completion of a successful probationary period, we offer the opportunity to join a pension scheme, which makes a matching contribution of up to 7.5% of salary.
Leave:	25 days per year plus bank holidays plus two additional days at Christmas and one at Easter.
Review:	This role has a six-month probationary period.

MAIN PURPOSE OF ROLE

The Finance Administrator will join the existing finance team to help monitor and control the Foundation's finances.

The overall purpose of this role is to keep accurate financial records, carry out reconciliations and produce a range of reports to support to the Finance Director, the Finance and HR Officer and the wider Foundation team. Your workload will be diverse and complex from financial processes to supporting the HR function.

You will have a wide range of finance and administrative experience, keen attention to detail, strong organisational skills, and excellent written and verbal communication skills. You will have a good working knowledge of financial practices and may be working towards an AAT qualification.



KEY RESPONSIBILITIES



Finance Administration

- Post incoming donations on CRM and Sage software
- Reconcile bank accounts, including credit cards and petty cash
- Prepare grants payment reports
- Prepare monthly supplier payment reports
- Post supplier invoices on Sage
- Generate Donor and Membership invoices on Sage
- Follow up on any late payments
- Submit monthly Gift Aid claim and record payments received
- Circulate weekly donations report
- Support campaigns by taking payments over the phone and online
- Provide support for preparation of quarterly management and year-end accounts
- Support the Finance Director with year end audit

HR Support

- Assist with the placement of job advertisements
- Acknowledge and collate applications
- Arrange interview schedules
- Support HR with policy updates

Governance

- Set up meeting dates for Trustees
- Keep conflict of interest forms up to date

Other General Duties

- Ad-hoc support for project work
- Maintain the IT equipment list
- Purchasing office supplies and equipment as needed
- Undertake other duties related to the work of the Foundation

PERSON SPECIFICATION



SKILLS & ABILITIES

Essential

- Exceptional administrative skills
- Ability to work to strict deadlines with a high level of attention to detail
- Strong IT skills
- Excellent literacy and numeracy skills, ideally with experience of writing a wide range of documents from emails to meeting minutes.
- Excellent communication, teamworking, and customer service skills
- Flexible and adaptable approach to working hours and job tasks

Desirable

- Experience of using Sage
- Confident with Microsoft Excel and Word

EDUCATION

Essential

- 5 GCSE passes or equivalent, especially in English and Maths

Desirable

- Working towards AAT qualification

EXPERIENCE & KNOWLEDGE

Essential

- Experience of working in a finance department and carrying out financial processes
- Experience of working with confidential material.

Desirable

- Experience of working in a fast-paced, working environment with competing pressures

PERSONAL ATTRIBUTES

Essential

- A strong team player, with ability to support colleagues
- Excellent communication and interpersonal skills
- Self-motivated with experience of managing a diverse workload
- Hard working, flexible thinking, capable and confident.
- Flexible approach to working hours, job tasks and responsibilities
- Willing to take on, and ability to cope with, new challenges
- A quick learner with an openness to new ideas
- Resilient, calm, and professional under pressure

Desirable

- Passion and understanding for the Foundation and its purpose
- Tactful, diplomatic, and assertive when dealing with challenging situations
- Ability to establish good relationships with a wide range of people including Trustees, donors, grantees and wider stakeholders

ANY OTHER REQUIREMENTS

Essential

- Passionate about supporting local people and addressing disadvantage
- Access to a car with a clean driving licence

EMPLOYEE BENEFITS PACKAGE

- Flexible working hours available with some remote working
- 25 days per year holiday plus bank holidays plus two additional days at Christmas and one at Easter
- Health Care Assistance Plan with employee benefits.
- Pension contributions of up to 7.5% of salary
- Commitment to personal training and development
- Regular full team away days/half days



OUR VALUES

Staff and trustees agreed these values together, and we embed them in everything we do



We empower people through sharing knowledge and expertise



We work with integrity and transparency



We listen, learn, and respond



We are passionate about creating positive and sustained change in our communities



We are ambitious, dynamic and effective



We reflect our communities' interests in all our work



We embrace equity and diversity and treat everyone fairly



We are a good and rewarding place to work and volunteer

WE LOOK FORWARD TO HEARING FROM YOU

MORE INFORMATION

For an informal discussion about the role, contact Lynsey Stokes or Helen Mackman on 01900 825760.

APPLY

To apply for this post please, complete the [APPLICATION FORM](#) by 9am Monday 11th March 2024

Interviews will take place in person on Monday 18th March 2024 on the first floor of CCF's offices. Reasonable adjustments will be made where required.

Professional and personal references will be required prior to appointment
Proof of right to work in the UK will be required.



Cumbria Community Foundation is a charitable company limited by guarantee. Registered in England and Wales. Charity Registration No: 1075120. Company Registration No: 03713328