

**Job Description**

**Job Title:** Office Coordinator

**Accountable to:** Chief Executive (Finance Manager 1-2 days a week based on work peaks and troughs throughout the year)

**Salary:** £26,000, £20,800 pro rata for 30 hours

**Hours:** 30 hours

**Work Location:** High Green Development Trust with access to hybrid working and home working with some travel.

**Key Relationships:**

Chief Executive, all staff within the SYCF team, the SMT members, volunteers and interns, Chair of the Board, Treasurer and other Trustees, UKCF; other local and national funders, donors, community groups; contractors, consultants and trainers.

**Job Purpose:**

The Office Coordinator is based in the Business Support Team and performs a varied role, assisting the CEO with operational and programme functions including business/office management related activity for the team, IT support, governance and support to the Trustees, health and safety, collating/monitoring performance data and research. The post also provides support for the Finance Manager with some finance functions, such as managing programme payments and invoices. This is a varied role that requires attention to detail, working on own initiative, maintaining confidentiality, and discretion.

Some project work may also be required as directed by the CEO or the Finance Manager. The postholder will be expected to provide cover for the Finance Manager when they are on leave or during periods of sickness.

**Key areas of Responsibility:**

Assist the Chief Executive in the strategic and operational development of the organisation maintaining all office functions for the team; carry out all governance responsibilities of the charity. Work with the Finance Manager and CEO to deal with any issues that may interrupt the smooth running of the organisation and seek to resolve them, raising the issues to management if appropriate.

**Governance:**

* Secretariat for the Trustee, Investment and Executive Committees - organise the Trustee meetings, Executive Committee and Investment Committee meetings, taking minutes as required, organise rooms and refreshments, Use the My Committee database.
* Assist the Chief Executive in managing the liaison and support to all trustees, organising inductions, keep up to date the Declaration of Interest returns, other information involving changes of contact details, registering new trustees with the Charity Commission and Companies House, dealing with day to day enquiries etc.
* Assist in the completion of Charity Commission and Companies House returns, Annual Trustees Report and Audit
* Secretarial support to SY Funders Group meetings
* Maintain and submit any necessary documents for the Finance Manager in line with Charity Commission and Companies House requirements.
* Arrange any meetings, refreshments and room bookings required by the CEO in relation to strategic partners, ad hoc Trustee meetings, meetings with the Chair etc.

**Operations/Administration:**

Support the SYCF wider team, as resources permit, with all appropriate administrative tasks to support team wide operations:

* Management of office supplies such as equipment, stationery etc., complete purchase order forms, report maintenance defects of the office premises, office equipment, and ICT systems
* Management of service contracts; and ensure development and maintenance of computer database files.
* Assist in managing Quality Accreditation (QA) submission for UKCF, with reference to financial and other matters.
* Assist the CEO in ensuring that all annual contents and indemnity insurance requirements are in reviewed and in place, maintain the Business Continuity Plan and assets list of equipment for the office, including organising PAT testing.
* Assist the Finance Manager in developing new procedures.
* Management of Health & Safety of the office and be the staff representative for Health and Safety matters including the Accident Reporting book.
* Maintain the office risk register and carry out regular office risk assessments
* Responsible for the post box and booking in and out of post.
* Complete room bookings for the staff team, ensuring budgets are checked against usage.

##### **HR and personnel matters:**

Working with the Finance Manager and CEO:

* Ensure that HR systems and records are maintained, developed and all information is correct and up to date, e.g. holidays, starters/ leavers, employment contracts, training records, appraisals, files etc.
* Ensure SYCF’s policies, procedures and handbook are up to date and regularly reviewed by the SMT/Board.
* Maintain log of team training and personal training.
* Update the website as required with new staff and Trustee information.
* Carry out general induction of new staff.
* Occasionally supervise volunteers and interns attached to the Business Support Team
* Set up dates/venue for staff meetings, circulate the agenda and other papers
* Manage the agenda, minutes, venues for the SMT meetings.
* Set up annual and six monthly appraisals for the CEO.

**IT Responsibilities:**

* To take responsibility for the day-to-day liaison with the IT Support provider.
* Assist the CEO and the Finance Manager with the annual review of the IT Support contract

**Data Responsibilities:**

* Produce, track and manage KPIs. Coordination and preparation of the monitoring information for Trustees and SMT; chasing for information from other members of the team.
* Monitoring the Annual Action Plan updates.
* Create Salesforce dashboards as required for the CEO and SMT members.
* Data inputting, updating Salesforce records for the CEO and the Finance Manager
* Assist in gathering information for reports and documents for evaluations, reports, surveys etc.
* Collating data on surveys and feedback for reports and KPIs.
* Contribute towards up dating the charity’s Business Plan

**Data Management:**

* Explore new ways of working to exploit new technology – social media etc.
* Take the lead on the use of AI technologies and suggest new ways or working for the team

**Income Generation:**

* Liaise with the Communications and Marketing Manager to assist with any work requirements re marketing and promotion e.g. “Seeing is Believing” events
* Maintain the Opportunities List updates working with the CEO and SMT.

**Other Responsibilities:**

* Identify and ensure best practice, value and procedures are adhered to
* Carry out any emerging task as deemed appropriate by the CEO
* Attend and contribute to regular supervision meetings with the CEO
* Work as part of a team ensuring that all team functions are covered in times of staff absence

**Finance**

**Banking administration:**

* Monthly bank reconciliation

**Income:**

* Reconciling
* Raising sales invoices as and when required

**Expenditure:**

* Reconciling Credit card spend with receipts
* Grant programme payments/checking bank information
* Setting up direct debits/standing order instruction
* Checking signature mandates

**Assets:**

* Manage fixed asset register, e.g. IT Equipment as required by the Finance Manager

**Finance Administration:**

* Setting up financial files
* Checking invoices and other paperwork
* Ensure staff have the equipment and access they need to do their jobs effectively. Maintain a register of all the charity’s equipment including IT equipment and list of licences.
* Manage relationship with suppliers and responsible for contract renewal, researching quotes and prices.
* Manage Cyber Accreditation renewal.

**Journals:**

* Creating and posting monthly and quarterly journals

**Assist the Finance Manager in the preparation of annual statutory accounts**

**Annual Audit:**

* Preparation of financial information for the year end audits. Collation of supporting documentation.
* Work for auditors for planning and fieldwork requests, as requested by the Finance Manager

**Programmes management:**

* Keep Salesforce up to date with income from grant programmes, endowments and business partners working with the Philanthropy and Grants Teams
* Financial (UKCF costs) reporting to Finance Manager and the SMT

**Management accounts reporting/Budget and reforecasting:**

* Preparing SAGE information to be imported into reforecasting and management account templates for the Finance Manager.

**Personal Specification – Office Coordinator**

**Essential Skills/Knowledge/Experience required:**

**Personal Qualities and Attributes:**

**Education and Qualifications:**

* Eager to develop, this role would suit someone who is currently educated to degree level with some knowledge of the importance of streamlining and digitisation of office systems. GCSE pass (or equivalent) Maths and English as a minimum.

**Essential Knowledge/Experience:**

* At least three years’ experience of administration
* At least three years’ experience of working with IT systems and databases Organisational, time-management and administrative skills.
* Great people skills, with an ability to communicate effectively with a range of stakeholders, in a variety of written and verbal formats.
* Proficient in IT– Word Processing, Databases, Email, including good Excel skills; used to analysing information, interpreting data and producing reports.
* Excellent attention to detail, with an ability to spot trends and errors – you’ll be comfortable with problem-solving and acting on your own initiative.
* Willing to learn and take on a variety of tasks.
* Familiar with and sympathetic to the voluntary and community sector at a local level and the needs of community groups.
* Working in a customer orientated environment
* Experience of working with Quality Systems and Accreditation Frameworks
* Committed to a user/customer orientated approach
* A motivational and developmental approach to personnel management
* Awareness of and committed to the need to combat social exclusion, sexual, racial and other forms of discrimination

**Essential Skills:**

* Self-motivated and able to work without supervision
* Ability to work calmly under pressure, meet set deadlines and pay meticulous attention to detail completing tasks fully, accurately and on time, prioritising where appropriate.
* Ability to deal with confidential information or situations in an appropriate and sensitive manner.
* Well-ordered and thorough
* Able to adapt systems to new needs e.g. AI
* Ability to organise an efficient and well-ordered office
* Ability to administer personnel systems
* Database management
* Word processing, use of email and internet
* Ability to take on board new work responsibilities and developments and sustain quality outputs
* Ability to communicate clearly and concisely in a range of media

**Qualities:**

* Ability to commit to and work with the aims, principles and policies of South Yorkshire Community Foundation Ltd. including a commitment to equality, diversity and inclusion.
* A flexible approach and willingness to work as a part of a team. This role requires the ability to wear ‘several hats at once’ as you will be working with Trustee queries, numbers one day and then the following day responding to the demands of the office.

**Desirable Skills and Abilities:**

* Experience of managing or supervising an office.
* Experience of working directly with members of the public in a client facing role.
* Experience in using accounting software. (Training will be provided).
* Knowledge of Health and Safety at Work.
* Knowledge of personnel systems
* Previous experience working in a finance role
* Own transport

**The role attracts the following additional benefits:**

* We currently offer a non-contractual flexible system of working through agile working and a non-contractual TOIL system: Within the organisation’s guidelines and with the agreement with their line manager staff can accrue “time off in lieu” [TOIL] based on working hours and then schedule to take this TOIL at a future date within the following month
* The organisation is currently working in a hybrid mode with staff spending some time of each week in the office, it is required that this role will spend a substantial proportion of their working time in the office
* Pension: The organisation operates an autoenrollment pension scheme with up to 4% matched contribution from employer
* Pleasant office environment with free car parking
* Cycle to work scheme (please enquire if interested)
* Westfield Healthcare after 12 months
* The job holder may occasionally need to travel within South Yorkshire area and sometimes beyond for meetings for which mileage will be paid at the standard rate
* The post is 30 hours, normally within office hours, but occasional evening work may be required
* Holidays will be pro rata 25 days a year plus bank holidays. Holidays to be agreed with the CEO
* The office is open between 9.00am – 5.00pm, Monday-Friday each week

## Team communications and reporting:

* No team member works in a vacuum, and it is essential that you communicate your needs to other team members and liaise with them where information needs to be shared
* There are regular reporting needs, monthly, quarterly, and annually and it is your responsibility to provide timely and accurate information to team members where required
* We all work within the framework of our values

## Office Maintenance:

* Always using Salesforce and other internal systems as agreed, keeping them up to date and accurate
* Take a fair share of office administration tasks when others are not around, such as opening the post, receiving visitors, answering the telephone etc
* Take a fair share of the tidying and cleaning the office
* Keep desks tidy and organised and make sure someone else knows how to find their way around your work in case of any absences

## Our Mission Statement:

What our Foundation is here to do for you:

* Deliver effective, efficient and targeted grant-making into communities that need it most, through a whole variety of funds from donors, trusts and other sources
* Work with businesses, philanthropists, trusts, the public sector and the third sector and other bodies to help them achieve their charitable aims and, particularly as money gets tighter, to make the most of every single charitable penny they invest in our communities
* Provide detailed intelligence on the state of our communities and how our grant making is improving lives and improving aspirations and opportunities for all ages and sectors

**Values:**

We are passionate about what we do – making a difference to those in need across South Yorkshire. We care deeply about all the people in our communities, our Donors – without whose generosity we could not do what we do and our team, whose determination to always do that little bit extra makes them extraordinary.

**We will do this by:**

Listening carefully to the needs of our community groups, donors and partners, to deliver solutions that have real impact.

* Acting always with honesty, integrity and transparency and treating everyone with respect and courtesy.
* Seeking likeminded organisations with whom we can work collaboratively to have an even greater impact.
* Providing a trusted, high quality, professional and accessible service, efficiently and responsibly run, with a strong commitment to delivering quality and empathic services to communities.
* Placing equal opportunities, diversity and inclusion and non-discrimination at the heart of everything we do and say.
* Welcoming feedback on what we do such that we can constantly improve. Positively embracing and driving the changes needed to support communities.