



July 2020

Dear Colleague,

Office Manager (Maternity Cover) – 35 hours per week

Thank you for your interest in the role of Office Manager at Friends Provident Foundation.

Friends Provident Foundation is an independent charity that makes grants and uses its endowment towards a fair and sustainable economic system that serves society. We connect, fund, invest and share learning to shape an economy that works for all.

An Office Manager is being sought for a period of one year, to cover the incumbent's maternity leave.

We wish to recruit someone to our small, friendly team, working to ensure the Foundation has effective administration, governance, financial and communication systems and procedures to enable colleagues, trustees and the organisations we support to meet our organisational and change objectives. You will be based in our office in central York.

Attached is a pack of information which I hope will encourage you to apply:

- The advertisement for the job
- Job description
- Person specification
- Data privacy notice

More information about us, including our most recent report and financial statements (2018-19) can be found on our website - www.friendsprovidentfoundation.org


If you would like an informal discussion, please contact me on the details below.

To apply, please submit your CV together with a covering letter outlining your fit with the role, and contact information for two referees, by **9am on Tuesday 25 August** to: enquiries@friendsprovidentfoundation.org.uk. Please note, we **will** always acknowledge receipt of your application.

Interviews will be held on Monday 7 September.

I hope this material is helpful and we look forward to hearing from you.

Sincerely,

A handwritten signature in black ink that reads "Kate Kendall". The signature is written in a cursive style with a large initial 'K'.

Kate Kendall
Finance and Operations Manager

Friends Provident Foundation
Blake House
18 Blake Street
York YO1 8QG
Email: kate.kendall@friendsprovidentfoundation.org.uk
Telephone: 07596 132442

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Fair economy. Better world.

FOUNDATION OFFICE MANAGER

1 Year Maternity cover

From £24,700 per annum, depending on experience

Full time

The Friends Provident Foundation is seeking an Office Manager to be the backbone of the Foundation's central operations, based in our offices in central York.

You will need to be proactive, systematic and solutions focused, have 2 years administrative experience, be literate, numerate and have good IT skills and the ability to provide a high quality, professional service to those whose work we support. Excellent communication skills, a willingness to explore new ideas and approaches, learn new skills and take on new challenges is essential. Experience of working within a multi-disciplinary team, working directly with a board and an understanding of the non-profit sector would be distinct advantages.

The Foundation office is in York but facility for home working will be important. Later in the year, the applicant may need to be able to travel occasionally within the UK. The post is full time; flexible working arrangements are available.

We welcome applicants from all age groups and backgrounds. We are a Living Wage employer.



If you would like to join the Foundation as our Office Manager, a copy of the application pack can be obtained by emailing enquiries@friendsprovidentfoundation.org.uk or downloadable from our website – <https://www.friendsprovidentfoundation.org/about-us/vacancies/>

Applications should be made by 9am 25 August 2020.

Office Manager (Maternity Cover)

Friends Provident Foundation

"Fair economy, better world"

Friends Provident Foundation is an independent charity that makes grants and uses its endowment towards a fair and sustainable economic system that serves society. We connect, fund, invest and share learning to shape an economy that works for all.

Since 2004, we've pioneered the creation of fair economy for a better world. Already, we've helped improve access to financial services for people who were once excluded and supported the development of resilient economic communities across the UK.

We're a catalyst for wider change, making an impact through continuous experimentation and shared learning. And we do all we can to embody the change we want to see. We invest in great social enterprises and use our money in line with our values.

Tomorrow, we'll continue to fund more new thinking, connect new ideas, invest our capital in line with our aims and values and create better systems so that in the future, the economy will serve both people and planet.

For more information see www.friendsprovidentfoundation.org

About the Role

To ensure the Foundation has effective administration, governance, financial and communication systems and procedures to enable colleagues, trustees and the organisations we support to meet our organisational and change objectives.

Reporting to: Finance and Operations Manager

Salary: From £24,700 per annum, depending on experience

Location: central York, with occasional travel within the UK

Start date: by 8 October 2020



Job Description: Office Manager

Job Title	Office Manager
Hours of work	Full-time, 35 hours per week
Salary	From £24,700, depending on experience
Location	Head Office, York (with occasional travel within the UK)
Reporting to:	Finance and Operations Manager
Purpose:	
To ensure the Foundation has effective administrative, governance, financial and communication systems and procedures to enable colleagues, trustees and the organisations we support to meet our organisational and change objectives.	

Key Responsibilities

There are six areas of responsibility with an emphasis on effective systems, governance, financial administration, and business improvement. These require an awareness and understanding of the work carried out by all members of the staff team across the Foundation. The areas are as follows:

- A. Responsible for the effective working of the Foundation's IT systems and administrative functions, including data protection;
- B. Responsible for the support of governance and company secretary functions and the handling of sensitive documentation;

- C. Facilitate communications to contribute to the Foundation's organisational goals;
- D. Responsible for the coordination of financial administration of the Foundation;
- E. Responsible for day to day office management;
- F. Responsible for the administrative support of the Foundation Director and Leadership Team.

A Systems and administration

Infrastructure

- Manage IT infrastructure and the Foundation's office phone system, in liaison with external service suppliers, with the aim to provide a professional accessible approach and good customer care;
- Maintain an overview of the Foundation's cloud-based management systems, acting as a point of expertise and support to colleagues, Trustees and external contractors;
- Take an active role in the development and enhancement of the Foundation's systems to meet changing operational requirements, working closely with other colleagues to support effective organisational working and business continuity;
- Review, maintain and develop the Foundation's administrative procedures, including the filing systems, both electronic and paper-based.

Data Protection

- Be a Nominated Data Controller under the General Data Protection Regulation Act (2018), advising on and ensuring Foundation adherence to data protection law and best practice;
- Ensure all information is handled and stored appropriately, including the management of application, contact, financial, governance, investment and grant information on the Foundation's databases.

B Governance and Company Secretary functions

Governance

- Maintain an overview of the governance cycle; organise and coordinate quarterly Trustee Board, Committee meetings and annual Away Days;
- Coordinate the preparation, collation and distribution of papers for Trustee Board meetings and committees in liaison with the Director, colleagues, advisors and the Chair; draft meeting papers as required;
- Attend Trustee Board and committee meetings, write and distribute the minutes and ensure follow-up of any matters arising;
- Coordinate the processes for the recruitment and retirement of Trustees and other committee members;

Company secretary and statutory responsibilities

- Support the Director in maintaining the public records of the Foundation with the Charity Commission and Companies House;
- Maintain the Foundation's Register of Interests;
- Manage documentation and systems relating to Trustees' fiduciary duties such as insurances, leases, investment documents, taxes and other legal agreements.
- Maintain an up-to-date knowledge of the latest developments in charity governance.

C Communications and events

Event coordination

- Take a lead in coordinating the logistics of the Foundation's events, including conferences, seminars, meetings, and events, working closely with the Communications Manager.

Communications

- Facilitate effective communication with Trustees, including sourcing the content for and editing weekly updates regarding the work of the Foundation and related organisations.

- Monitor and ensure accuracy and brand consistency in the Foundation's documents;
- Build and maintain communications databases;
- Update the Foundation's website, as required; support the Communications Manager in further development of the website;
- Take an active role in creating content to support the Foundation's social media strategy;
- Be the Foundation's first point of contact for individuals and organisations, including grantholders, investees, suppliers, consultants, trustees and enquirers; respond to telephone calls, correspondence and other communications, and redirect to the relevant staff.

Publications

- Manage the storage and distribution of the Foundation's publications and other communications materials.

D Financial administration

- Take an active role in the maintenance and development of the Foundation's financial systems and procedures, working closely with the Finance and Operations Manager and coordinating across the team;
- Process payments, ensuring the correct supporting documents are provided for all new payees; log all invoices and ensure correct authorisation prior to payment; check all expense claims and credit card payments to supporting documentation; ensure financial procedures have been followed correctly;
- Set up payments from the main bank account, initiating authorisation in accordance with the bank mandate and online procedures and ensuring payment deadlines are met; ensure bank mandates are up to date;
- Develop and maintain financial documentation to auditable standards and ensure it is available for completion of the annual accounts and other regular financial reports; support the annual audit process;

- Maintain records on the Foundation's accounting package on a monthly basis.

E Office management

- Manage all office facilities and coordinate all matters relating to the Foundation's offices as a safe and effective working environment;
- Identify and manage the key risks linked to the Office Manager's areas of responsibility;
- Liaise with the landlord to ensure all required office procedures are followed;
- Procure office equipment and supplies; coordinate tender processes, where applicable.

F Support to the Director and Leadership Team

- Provide administrative support to the Director and Leadership team producing correspondence and documents, proofreading documents, diary management, organising meetings, travel arrangements etc;
- Coordinate, develop and support ways of working for the staff team, to promote team cohesion and effective working between colleagues with different working patterns, locations and functions; organise regular Team Meetings and work with colleagues to deliver the annual staff Away Days;
- Coordinate recruitment processes for new members of the staff team;
- Carry out discrete pieces of work in support of the Director's role;
- Undertake any duties reasonably requested by the Director to support delivery of the Foundation's mission, aims and objectives.



Person Specification

Office Manager

Experience

Essential:

- At least 2 years working as a senior administrator or office manager to a team or individuals
- 12 months experience working as a paid or regular volunteer bookkeeper or finance assistant
- 12 months of using a financial accounting package
- Experience of preparing, writing and typing agendas, minutes, reports, presentations, letters and other documents
- Recent experience of managing and coordinating administrative systems, including cloud-based IT
- Experience of developing and maintaining organisational systems for information storage and retrieval, website management, diary systems, systems for messaging etc
- Experience of working without day-to-day supervision

Desirable:

- Experience of coordinating charity annual accounts and annual reports
- Experience of working to a Board
- Experience of Salesforce or other relational databases
- Experience of working in a multi-disciplinary team
- Social media and website management experience
- Experience of working in a small organisation
- Experience of work in the charity sector
- Understanding of company secretarial requirements
- Event organisation and management

Skills

Essential

- Highly literate and numerate, with good verbal skills
- Ability to maintain and develop an efficient and effective office environment including developing systems for the administrative needs of different functions
- Excellent attention to detail
- Proven ability to write documents and letters, compiling information from a range of sources for presentation to senior staff/Boards
- Ability to take accurate notes and minutes of meetings
- Fast, accurate word-processing of documents and particularly letters and minutes
- Ability to prioritise own work
- Excellent inter-personal skills, working with colleagues, government officials and regulatory bodies
- Excellent organisational skills
- IT and web literate, comfortable with a variety of online tools, ability to learn new software programmes quickly

Desirable

- Highly developed minute-taking skills
- Website development skills
- Systems development skills

Knowledge/Expertise

Essential

- Excellent knowledge of word processing, spreadsheets, relational database management and computerised accounting systems
- Clear understanding of confidentiality with regard to financial and staffing information
- Understanding of the principles of double entry bookkeeping

Desirable

- Working knowledge of the Charities' SORP
- Knowledge of health and safety legislation as it relates to small organisations

Qualifications

- No specific qualifications required, although a qualification in office management or financial administration would be an advantage
- A commitment to continuing professional development is essential

Personal attributes

Essential

- Proactivity and self-sufficiency
- Team working
- Confident communicator
- Sympathy with the stated aims and ethos of the Foundation
- Ability to multi-task and communicate
- Ability to work independently and on own initiative
- Ability to work as part of a team
- Flexibility of working practices, including work evenings at least 8 times per annum
- Ability to travel within the UK at least 8 times per annum for meetings of Trustees
- Must be able to handle confidential information and relationships appropriately

Terms and Conditions of Employment

This is a one-year fixed-term contract for a full time role with Friends Provident Foundation, which will be based at the Foundation's office in York. The Foundation fully supports flexible working and will consider proposals for meeting the 35 hours we expect the post to require. Any offer of employment made will be subject to the receipt of satisfactory references. The appointment will be confirmed, subject to a satisfactory three-month probationary period. It is a requirement of all staff to be familiar with the Foundation's policies.

How to Apply

Please submit your CV together with a covering letter outlining out your fit with the role and person specification, and contact information for two referees, **by 9am, Tuesday 25 August** to:

Kate Kendall
Finance and Operations Manager
Friends Provident Foundation
Blake House
18 Blake Street
York YO1 8QG
Email: enquiries@friendsprovidentfoundation.org.uk

Please submit your application to enquiries@friendsprovidentfoundation.org.uk directly.

If you would like an informal discussion, please contact Kate Kendall, Finance and Operations Manager, kate.kendall@friendsprovidentfoundation.org.uk.

Interviews will be held on Monday 7 September.

Privacy Notice

What we collect and why

When you apply to us for a job role you will be providing personal data about yourself, through which you can be identified. We have written this notice to let you know how we will handle and protect your information.

Information which may be collected during a recruitment process, may include:

- Name
- Your work, education and training history
- Contact information including email address, postal address and phone number
- Contact information for your referees
- Any other personal information which you choose to give us relating to your application
- Notes made by the selection panel during shortlisting and the interview process

We require this information in order to review your application, undertake and support the recruitment process, and communicate to you the decisions and outcomes of that process.

The General Data Protection Regulation 2018 (GDPR) sets out that we are required to have a lawful basis for processing your data. In this instance we are processing your data under 'legitimate interests' specifically to support our recruitment process and applicants, as outlined above.

We store this information on our office IT systems, including cloud-based directories and email system, and in paper-based files. We retain information for unsuccessful applicants for a period of 6 months following the completion of the recruitment process, to enable us to provide feedback, address any other queries, or disputes. After a period of 6 months we will delete your data.

For any concerns you have about our use of data, please contact:

Data Protection Lead: enquiries@friendsprovidentfoundation.org.uk or on 01904 629675. You can also contact the Data Protection Regulator, the Information Commissioner's Office (ICO): <https://ico.org.uk/global/contact-us/>