



June 2022

Dear Colleague,

Office Manager (Job share, 21 hours per week to ideally include Monday, Tuesday, Wednesday)

Thank you for your interest in the role of Officer Manager at Friends Provident Foundation, an independent charity that makes grants and uses its endowment towards a fair, resilient and sustainable economic system that serves people and planet. We connect, fund, support and invest in new thinking to shape a future economy that works for all.

We are a small, friendly team, where the significance of each individual is recognised. We work closely together to achieve our goals in a supportive environment.

An Officer Manager is being sought for a permanent job share role, for 21 hours per week to ideally include Monday, Tuesday and Wednesday. Attached is an information pack about the post that I hope will encourage you to apply. It includes: advertisement, job description, person specification, and a data privacy notice.

The Office Manager gets involved in all aspects of the Foundation's work. They work alongside the grants team, who manage over 60 grants worth £8.5 million, the Investment Engagement Manager who campaigns on environmental and social issues through the investments we make, and the Communications Manager who is working to make our communications more accessible and promote the work of the foundation. You can find out more about us and the work we do on [our website](#) and in our most recent [annual report \(2020-21\)](#).

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 12 July** to: caroline.watson@friendsprovidentfoundation.org.uk We will always acknowledge receipt of your application. We plan to hold interviews on Thursday 21 July 2022. If you would like an informal discussion, please contact me on the details below.

Sincerely,

Kate Kendall

Finance and Operations Manager

Email: kate.kendall@friendsprovidentfoundation.org.uk

Telephone: 01904 629675 (Working days: Tuesday, Wednesday, Thursday)



Office Manager (Job share)

21 hours per week, to ideally include Monday, Tuesday, Wednesday
Salary: £25,700 – £27,000 pro rata

Based in central York with occasional travel

Friends Provident Foundation is a small, independent, endowed charity based in York - with a big ambition to build a fair economy and better world. A belief in equity and social justice, striving for fairness, truth and integrity, empowering communities and stewardship of the Earth underpins all we do.

We are seeking an Office Manager to join our small, friendly team, in a job-share role.

We are looking for someone who is proactive and solutions focused, able to work well independently, as well as part of a team. The ideal candidate will have 2 years administrative experience, be literate, numerate, have good IT skills and the ability to provide a high quality, professional service to those whose work we support and our Board of Trustees. You will have excellent communication skills, a willingness to explore new ideas and approaches, learn new skills and take on new challenges.

The post is based in our office in central York, although this could be combined with some home-working. The role involves some travel within the UK from time to time to attend Trustee meetings and other events.

If you share our values and ambitions and are interested in joining our team please visit our website to download the application pack:

<https://www.friendsprovidentfoundation.org>

We welcome applicants from all age groups and backgrounds and are committed to flexible working arrangements. We are a Living Wage employer.

Deadline for applications: 9am on Tuesday 12 July 2022

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, including Microsoft Office and Salesforce, 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

Experience

Essential:

At least 2 years working as a senior administrator or office manager to a team or individuals

- Experience 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 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

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
- A commitment to continuing professional development

Desirable

- Knowledge of health and safety legislation as it relates to small organisations
- Understanding of the principles of double entry bookkeeping

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 working occasional evenings, to cover Trustee meetings and other events
- Ability to travel within the UK, occasionally, to cover Trustee meetings and other events
- Must be able to handle confidential information and relationships appropriately

Terms and Conditions of Employment and benefits include:

- This is a permanent part-time contract with Friends Provident Foundation, based in its office in central York.
- Any offer 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.
- The Foundation fully supports flexible working and will consider proposals for meeting the 21 hours the post requires.
- Generous pension scheme, with 13% employer contribution
- Life insurance cover
- [Climate Perks](#) scheme: paid journey days to choose low-carbon holiday travel

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 on Tuesday 12 July** to:

Kate Kendall
Friends Provident Foundation
Blake House
18 Blake Street
York, YO1 8QG

Email: caroline.watson@friendsprovidentfoundation.org.uk

If you would like an informal discussion, please contact Kate Kendall, Finance and Operations Manager

We plan to hold interviews on Thursday 21 July 2022, in York

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>