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**Candidate Information Pack**

**Finance and Database Officer**

**Please find enclosed:**

## Background Briefing

## Job Description and Person Specification

* The Recruitment Process
* Application Form

**For background information please go to** www.acf.org.uk

**Association of Charitable Foundations Finance and Database Officer**

**Why Join Us?**

Would you like to work in a focused and dynamic organisation that is working on behalf of an irreplaceable social asset?

The Association of Charitable Foundations (ACF) is the membership association for foundations and grant-making charities in the UK.

Charitable foundations are a vital force for social good. At their best, they are the most transparent intentional and efficient way of transforming private wealth into public benefit. They embody the belief that things can be better - mobilising funding, resources and expertise in the service of supporting others, whether by preserving social good that is under threat or catalysing it where it is absent.

For 25 years we have supported trusts and foundations by developing and enabling policy and communications initiatives; providing opportunities for learning and discussion; sharing knowledge and best practice and providing events and professional development opportunities.

ACF’s membership comprises over 300 organisations trusts and foundations. Collectively our members hold £25 billion in investments and assets; and give over £1.7 billion every year to a diverse range of organisations and people: from community groups, charities and social enterprises to museums, hospitals and schools.

Comprising a small, dedicated and ambitious staff team, ACF’s work sits at the intersection of private capital and public good, existing to support grant makers in their practice though the provision of information, advocacy and learning.

**About the role**

Supported by the Head of Resources, the Finance and Database Officer will play a key role in ensuring that ACF has the finance and membership management systems it needs to deliver its service and support to members. This is a newly configured role which brings together financial management and database management for the first time. There is great scope for the post-holder to make a real and lasting difference to the way that ACF supports its members.

**Salary and hours**

Salary: £27,000

Benefits: ACF offers a generous pension scheme and staff travel loans

Hours: Full time, 35 hours per week. Flexible working can be considered

Contract type:Permanent

Location: Kings Cross, London

The closing date is **10am on Tuesday 21 June, 2016.**

Interviews will be held on **29 June at ACF’s offices**

**JOB DESCRIPTION – Finance and Database Officer**

**Job Title:** Finance and Database Officer

**Works to:** Head of Resources

**Purpose of the post:** To support the finance and membership functions and ensure ACF develops sound systems and processes

**About the role**

Reporting to the Head of Resources, the Finance and Database Officer will play a key role in ensuring that ACF has the finance and membership database systems it needs to deliver its strategic objectives. This will include:

**Finance**

1. To ensure the accounts records are accurate and up to date; to take the accounting system to trial balance each month
2. To keep the sales and purchase ledgers up to date: raising sales invoices, processing purchase invoices and setting up online payments
3. To support the organisation by being the first point of contact for internal accounts queries
4. To assist with the annual budget setting process and annual statutory accounts preparation
5. To provide any other support to ensure the smooth running of the finance function.

**Database**

1. To keep the finance module of the membership database up to date and reconciled with the accounting records on a monthly basis
2. To provide administrative support in the annual membership renewal process
3. To assist with the new member application process: adding applicant details, contact details, checking supporting documents and preparing new member welcome packs
4. To maintain the integrity of ACF’s CRM database: keeping it up-to-date; proactively checking and updating contact data
5. To assist with developing CRM user guides and training for staff, and ensuring data entry and data protection standards are followed
6. To maintain up to date email distribution lists and ensure ~~t~~he ACF website, Fundernetwork and CRM database lists are reconciled on a regular basis
7. To keep member records up to date and in accordance with data protection principles.

**Office Management**

1. To liaise with suppliers and tenants, and act as the first point of contact for internal ICT issues
2. To lead on health and safety policies, and workplace practice
3. To meet and greet visitors to ACF when the Administrator is away
4. To provide any other administrative support as required.

**Supporting the work of ACF**

1. To ensure that the principles of equality and valuing diversity underpin the execution of the responsibilities and tasks described above
2. To have regard to environmental good practice in all areas of the work
3. To undertake any other duties in support of ACF’s work as may reasonably be required.

**PERSON SPECIFICATION – Finance and Database Officer**

| **Knowledge, skills and experience** | **Essential** | **Desirable** |
| --- | --- | --- |
| 1. Experience of supporting a finance function and of charity book-keeping
 | ✓ |  |
| 1. Experience of using and maintaining databases ensuring accurate data entry and data quality
 | ✓ |  |
| 1. A good working knowledge of MS Excel and MS Access and an ability to manipulate data
 | ✓ |  |
| 1. Able to analyse and present information clearly and accurately in a variety of formats
 | ✓ |  |
| 1. A customer focused approach to working with colleagues and external contacts
 | ✓ |  |
| 1. Highly organised, efficient with good attention to detail
 | ✓ |  |
| 1. An interest in the voluntary and community sector
 | ✓ |  |
| 1. Experience of working for a membership organisation
 |  | ✓ |
| 1. Experience of using a CRM database
 |  | ✓ |
| 1. Familiarity with basic CMS and online marketing tools
 |  | ✓ |

| **Personal qualities and abilities** | **Essential** | **Desirable** |
| --- | --- | --- |
| 1. Ability to deal in a helpful, friendly and professional style with people from a range of different backgrounds and levels of seniority, and with member organisations of varying sizes
 | ✓ |  |
| 1. Excellent team worker
 | ✓ |  |
| 1. Strong time management skills, with the ability to work well under pressure and to organise and co-ordinate work to meet deadlines
 | ✓ |  |
| 1. Highly motivated and enthusiastic
 | ✓ |  |
| 1. Commitment to implementing equality and diversity policies, empathy for and commitment to ACF’s aims and core values, and assisting ACF in delivering its commitment to being a more environmentally responsible organisation.
 | ✓ |  |
| 1. Highly developed sense of personal integrity and discretion
 | ✓ |  |

**RECRUITMENT PROCESS – Finance and Database Officer**

## Timetable

## Deadline for applications: Tuesday 21 June 2016, at 10am

## Panel interviews: 29 June at ACF’s offices

## To Apply

If you would like to apply for this role, please complete this Application Form and Equal Opportunities Monitoring Form (downloaded from

http://www.allysondavies-consultant.com/job-board/equal-opportunities-monitoring-form/ ). Attach a CV outlining your career to date, including any academic and professional qualifications.

Please send these three documents, **by 10am on 21 June 2016**, to

acf@allysondavies-consultant.com

**Information**

If you require any further information or you would like to discuss anything in more detail, please contact Allyson at the above email address, or call 020 7828 3855 or 0796 855 6164.

**APPLICATION FORM**

**Association of Charitable Foundations
Finance and Database Officer**

Please complete this form **(delete the preceding pages of this document)**, and attach your **CV** outlining your career to date including any academic and professional qualifications, and the completed [Equal Opportunities Monitoring Form](http://www.allysondavies-consultant.com/job-board/equal-opportunities-monitoring-form/). The closing date is 10am on **21 June, 2016.** Please email your application to**acf@allysondavies-consultant.com****.** Interviews will be held on the afternoon of the 29 June at ACF’s offices.

If you require any further information or you would like to discuss anything in more detail, please contact Allyson at the above email address, or call 020 7828 3855 or 0796 855 6164.

|  |  |
| --- | --- |
| Full name |  |
| Address |  |
| Mobile phone |  |
| Home phone |  |
| Email |  |
| How did you hear of this post? |  |
| Are you eligible to work in the UK? |  |

Please give details of two professional referees: your current or most recent, and a previous employer:

|  |  |  |
| --- | --- | --- |
| Name of referee |  |  |
| Professional relationship to you |  |  |
| Telephone |  |  |
| Email  |  |  |
| Okay to approach now? |  |  |

Please give details of your current income and benefits details:

|  |  |
| --- | --- |
| Basic Annual Salary |  |
| Annual leave entitlement |  |
| Employer’s pension contribution |  |
| Employee’s pension contribution |  |
| Any other benefits |  |
| Notice required  |  |

On no more than two pages, please state:

1. Why you would like to be the Finance and Database Officer at ACF
2. Please outline the experience and skills you can bring to this role in relation to the following three elements of the person specification:
* supporting a finance function;
* maintaining a membership database;
* and taking a customer focused approach to your work.

**DECLARATION**

I declare that the information that I have provided on this form is true and accurate, and in particular that I have not omitted any fact which may have a bearing on my application. I understand that any subsequent contract of employment with the ACF will be made on the basis of the information I have provided. I understand that a false declaration, which results in my appointment to ACF, will render me liable to dismissal without notice. I also understand that submitting this form electronically is equivalent to a signed declaration.

**Signature (type name)** \_\_\_\_\_\_\_\_\_\_

**Date** \_\_\_\_\_\_\_\_\_\_