

MASONIC CHARITABLE FOUNDATION

Grade:

JOB DESCRIPTION

Job Title:	Donations Administrator (Relief Chest)	Job Code:	
Function/Team:	Relief Chest Scheme	Location:	Freemasons' Hall, 60 Great Queen Street, London WC2B 5AZ
Accountable To:	Senior Relief Chest Officer	Direct Reports:	
Team Size:	18	Geographic Working Area:	Freemasons' Hall, Lower Ground Floor.
Peers – Own Team/Department:	Relief Chest Administrator	Peers (Other Departments)	
Budget Responsibility:	N/A	Description of Budget:	N/A
Job Purpose:	<p>To assist with managing high volume of incoming donations via Regular (direct debits) and Single donations. Dealing with multiple aspects of the donation processing, validation, allocation and confirmation to the donor.</p> <p>To provide general administrative support.</p>		

KEY RESULT AREAS:

What are the key outputs of the job? (What results do you leave behind?)	What are the success measures of the job? (How will we know if you have done your job well?)	What are the main tasks of the role? (What skills are you required to have?)	What are the main decisions that you are required to make in your job?
Assisting with banking and processing postal donations.	<ul style="list-style-type: none"> • All donations are accurately recorded and processed in a timely manner on a daily basis in accordance with HMRC rules, ICO data protection guidelines, staff operating handbook and Relief Chest operating manual. • All donations are processed in line with additional guidelines/instructions set by Relief Chest Director. 	<ul style="list-style-type: none"> • Timely and accurate processing of donations. • Dealing with queries by telephone and email and by meeting visitors to reception. • Opening daily post on a rota basis. • Annual Archiving. • Ability to use various payment and donor record platforms. • Check, log and bank cheques. • Process donation paperwork via data capture solutions and databases. • Adhere to HMRC Gift Aid Tax rules. • Abide by ICO Data Protection regulations. • Fulfil acknowledgements to donors. 	<ul style="list-style-type: none"> • To establish relevance and validity of a donation to individual relief chests / donor advised funds / appeals. • Reference to internal & HMRC/ICO guidelines. • Protocols in an event of query.
Assisting with identifying and processing direct credits and deposits made via local banking.	<ul style="list-style-type: none"> • All direct credits and deposits are accurately recorded and processed in a timely manner on a daily 	<ul style="list-style-type: none"> • Access and check relevant bank statements. • Receive and identify local banking paying in slips for 	<ul style="list-style-type: none"> • To establish relevance and validity of a donation to individual relief chests / donor advised funds /

	<p>basis in accordance with HMRC rules, ICO data protection guidelines, staff operating handbook and Relief Chest operating manual.</p> <p>All direct credits and deposits are processed in line with additional guidelines/instructions set by Relief Chest Director.</p>	processing.	<p>appeals.</p> <ul style="list-style-type: none"> • Reference to internal & HMRC/ICO guidelines. • Protocols in an event of query.
Provide general administrative office support.	Queries are dealt with in an efficient manner and within the timeframe set out in operating procedures and policies	<ul style="list-style-type: none"> • Answer telephone, post and email queries politely and efficiently • Provide support to other team members during peak times. 	<ul style="list-style-type: none"> • When to escalate to other team members
Archiving records.	Donation paperwork is organised and archived in accordance with all relevant policies and Data Protection legislation.	<ul style="list-style-type: none"> • File donation paperwork and correspondence daily in a secure manner • Organise archiving to secure location • Destroy as per Data Protection retention schedule • 	<ul style="list-style-type: none"> • Protocols in an event of query.

PERSON SPECIFICATION:

Requirement	Essential	Desirable
Education	<ul style="list-style-type: none"> • GCSE level education, Maths and English or relevant experience. 	
Experience	<ul style="list-style-type: none"> • MS office products, for example, Word, excel etc. • Data input, using manual and automated methods. • High volume transaction processing. • Fulfilment and administration of records/letters. • Working in a busy office environment. • Good customer service skills. 	<ol style="list-style-type: none"> 1. Working in the charity sector 2. Customer Relationship Management databases. 3. Data capture software. 4. Electronic record keeping.
Knowledge	<ul style="list-style-type: none"> • Databases. • Online payment platforms. • Good general IT knowledge. 	<ul style="list-style-type: none"> • Gift aid tax relief • Fund raising activities • Data protection regulations.
Skills	<ul style="list-style-type: none"> • Attention to detail. • Accuracy of data input. • Ability to communicate with supporters, donors and colleagues. • Good oral and written communication skills. • Ability to meet strict deadlines. 	

Note: This job description is developed as a general guideline for what is required in this role, and is not a definitive statement. The operational requirements of the organisation as well as annual objectives will influence the requirements of all jobs and employees. In other words, job holders will be expected to carry out reasonable tasks required of them, over and above what is described herein. This job description is also subject to review and change from time to time, subject to discussion with the post holder(s).

Action:	Name:	Date:
Reviewed by:	Dilhani Jayasinghe	10 April 2018