



Raising funds for those most in need

Job Specification

Finance & Administration Assistant

30 - 35 hours per week (depending on candidate)

Ideally working over 5 days, with 3 days based in our Poole office

Are you an enthusiastic individual with an accounting qualification or accounts department experience? Do you enjoy working with numbers, people and processes? Are you a skilled planner with a talent for managing busy schedules?

Dorset Community Foundation is one of 47 UK Community Foundations in the UK. We help individuals, families, trusts and businesses give back to Dorset to improve the lives of others. We award more than £1 million a year in grants which help local charities and community groups make their communities better and individuals to change their lives.

We are looking for a Finance & Administration Assistant to join us on a for 30 - 35 hours a week, to support our financial activities and provide additional support for our trustee board and senior staff. If you want to use your expertise to support local community action and issues such as poverty, discrimination, mental health, loneliness and isolation, this is the role for you.

The Benefits

- Salary c£22,500 (FTE) pro rata dependant on qualifications and experience
- Pension scheme
- 26 days holiday (pro rata) plus Bank Holidays
- Flexible working schedule
- Work in a small, friendly team

The Role

As a Finance & Administration Assistant, you will support and maintain our financial records and ensure the efficient running of the accounts function in-line with all current legislation. You will support our grant-making processes, particularly in relation to grant payments processes. You will act as a key point of contact for our Board of trustees, establishing yourself as their 'go-to' in the charity and supporting them as they undertake their responsibilities in relation to the charity. You will provide PR support to our Chief Executive - your attention to detail and ability to anticipate needs will help the Chief Exec focus their time more effectively.

Supporting the Finance Manager, you will:

- Maintain banking records and support the completion of bank reconciliations.
- Update and maintain the SAGE accounting system.
- Process all purchase / sales ledger invoices.
- Help maintain donation records and grants paid on our CRM system.
- Carry out monthly payment runs, including processing on our online banking platform, liaising with trustees and Grants team.
- Support the delivery of the financial management reports and papers.
- Support the Finance Manager with any relevant ad-hoc requests.

Supporting the Grants team, you will:

- Check that funding applications are complete, request any required information and undertake basic checks
- Arrange panel meetings and visits to funded groups/individuals
- Input panel decisions, set up and oversee grant payments using our CRM system
- Inform groups of panel decisions and maintain receipt records as needed
- Monitor the DCF Admin inbox and answer telephone calls and messages, providing general information on grants programmes and diverting queries to other staff members appropriately

Supporting the trustees, you will:

- Provide administrative support in the planning of Board meetings and subcommittee meetings, liaising with staff
- Arrange and attend Board and subcommittee meetings, preparing agendas, sending papers and taking minutes
- Act as a point of contact for Board member enquiries and requests, liaising with other staff members to respond
- Support Board members in their duties by providing timely reminders of agreed actions

Supporting the Chief Exec, you will:

- Manage Chief Exec diary, emails, and communications, ensuring effective prioritisation and scheduling
- Support delegation of tasks to other staff as needed
- Arrange meetings and participation in events, overseeing any travel, accommodation and hospitality needs
- Ensure the Chief Exec has the relevant reports, papers and data for their meetings and events
- Receive and distribute all incoming mail
- Provide a range of confidential administrative support from letter formatting to arranging trustee signatures

About You

We are looking for a candidate with skills including financial, secretarial, committee support, PA and general administration. Ideally, you will have accountancy and/or finance experience from within a charity environment, but this is not essential.

Desirable traits

- Microsoft excel spreadsheet skills
- Experience of data administration and keeping accurate records
- Basic experience of working within an accounts department
- Experience of using accounting systems i.e., Sage, Xero
- Professional approach acting with tact, integrity, and discretion
- Great work ethics
- Strong time-management abilities
- Strong commitment to confidentiality
- Good attention to detail

To apply

The closing date for this role is 20th March 2025.

Please apply with your CV and a supporting letter either via email or post to admin@dorsetcf.org or the address below