

The Steel Charitable Trust (“the Trust”)

Role Description/s

Job Title

Trust Manager Full-Time/Part-Time

This role can either be undertaken as a full-time or part-time role, the latter supported by an Accounts Administrator.

Responsible to

The Chairman

Primary Purpose

- To undertake the general management and administration of the Trust, under the guidance and direction of the Chairman.
- To support the Chairman and Trustees of the Trust in the management of its grant making, investment strategy and financial matters.
- To develop and maintain the charity network in the Bedfordshire area, and advise the Trustees accordingly.

Key Responsibilities

General Duties

- To run the office in Luton and to manage it efficiently.
- To represent the Trust in a professional manner at all times.
- To maintain and update the website.
- To undertake any reasonable duties as requested by the Chairman and/or any of the Trustees.

Grant Administration

- To manage the grant management database (Benefactor).
- To record all grant applications electronically.
- To send acceptance letters to all successful applicants and appropriate letters to unsuccessful applicants after each Board meeting.
- To distribute cheques to all successful applicants upon receiving appropriate acceptance to the Trust’s grant offer letter.

- To maintain and develop the on-line payment system to include payments for grants awarded and replace the current cheque system.
- Maintain the website's information to ensure appropriate and accurate information is available to the public.
- Support Trustees in relation to research of a particular charity or grant-giving history.
- Support grant applicants when necessary.
- To ensure that The Steel Administrative Work Guide is kept updated.

Finance and Investment Portfolio (Note this section could be supported by an Accounts Administrator if the Trust Manager role is part-time)

- To maintain up to date records for financial transactions, using a system (currently Excel) with supporting documentation and filing systems.
- To prepare quarterly management accounts for the Trustee Board meetings.
- To prepare the annual accounts for submission to, and to liaise with, the auditors when required.
- Monitor and maintain all bank statements, transfer funds to and from bank accounts, prepare reconciliations and supporting papers.
- Ensure payroll is managed and signed off appropriately.
- Support the Trustees' Investment Policy.
- To prepare monthly PAYE and annual P60 forms, annual tax returns and accounts and other necessary returns to be sent to the HMRC, Companies House and the Charity Commission.

Trustee Meetings

- To prepare the agenda and appropriate reports for submission to the Board on matters, including investment, finance and grant making, all of which are signed off by the Chairman.
- To ensure that all Board papers are produced in a timely manner for four meetings a year and approved before circulation by the Chairman.
- To book rooms and refreshments and any necessary equipment for meetings.
- To draft the minutes of each Board meeting and circulate within two weeks of the meeting to all the Trustees.

- To ensure best practice compliance in line with the Charity Commission's Good Governance guide.
- Update the Charity Commission and Companies House appropriately.

Bedfordshire

- In the first instance to work with Trustees to learn and understand Bedfordshire charitable network and to develop further.
- To advise the Trustees on key issues in Bedfordshire in relation to charitable endeavour.

Experience, Knowledge and Skills

Experience

- Experience of working in a management role in the third sector would be preferable.
- 5-8 years minimum of general management working within a professional environment.
- A relevant qualification such as ACCA (only required if Trust Manager is full-time)
- Experience of working with Board/Committees is essential.

Knowledge

- Knowledge of bookkeeping preferably with a related professional qualification. (Only if Trust Manager is full-time.)
- Strong experience of managing finance, preferably in a grant-giving or charity environment.
- Some knowledge of charity law affecting arrangements of a Trust.
- Educated to degree level/financial or management qualification/ or related level of experience.

Skills

- High-level skills in Microsoft Office (ie Word, Excel, PowerPoint), including cloud facilities, and database management.
- Excellent standard of English both written and verbal plus good communication skills.
- High-level Board minute-writing skills.
- Willingness to undertake further training as necessary.

Personal Attributes

- Self-motivated and energetic and capable of working alone.
- Ability to work with a wide range of people.
- Maintaining a high standard of personal presentation at all times with a good telephone manner.

- Mobility within Bedfordshire, London and occasional travel within the UK is required. (See car owner below.)

Additional Information

Hours

The working week is 35 hours or 21 hours for the part-time role. However, the nature of the work will require a level of flexibility and very occasionally evening and weekend working. There is no payment of overtime but Time off in Lieu (TOIL) is possible with the agreement of the Chairman in advance of this being required.

Leave

The annual leave entitlement for the full-time role is 20 working days (plus public and bank holidays) to be taken with agreement of the Chairman. (12 days pro rata for part-time role). It is expected that holidays will not be taken around the time when Board papers are being prepared, when Board meetings are held or when grants are being paid.

Salary

The annual salary is £45,000 for the full-time role. £27,000 for the part-time role. Salaries are paid monthly in arrears.

Pension Scheme

The Trust is prepared to support a personal pension scheme making a contribution of up to 3% of annual salary to a government-recognised scheme.

Expenses

Any personal expenses, in addition to mileage costs, incurred in the course of carrying out the duties will be reimbursed upon production of appropriate documentation.

Probation and Notice

The post is subject to a six-month probationary period and thereafter three months' notice on either side.

Location

The role will be based in Luton.

Car Owner

Mileage costs, at the rate approved by the Inland Revenue, will be paid when carrying out Trust's work and it is essential for the successful candidate to be a car owner and have a current licence.

Recruitment Process

Candidates will be required to submit a letter of application, an application form available from the Trust's website and a short statement outlining what attracts them to the role of Trust Manager for the Trust to Nataliebriggs51@gmail.com

There will be a two-stage interview process: two Trustees will interview those candidates who are long-listed. The Board of Trustees will interview the short-listed candidates. References will be taken up before a formal offer of appointment is made.

17th August 2017

The Steel Charitable Trust

Accounts Administrator Part- Time role (max 14 hours)

Primary Purpose

This role is to support a Part-Time Trust Manager to ensure that the financial and investment portfolio of The Steel Charitable Trust is administered appropriately. The person can either be employed on a part- time basis or be self-employed.

Key Responsibilities

- To maintain an up to date records for financial transactions, using a system (currently Excel) with supporting documentation and filing systems.
- Prepare quarterly management accounts for the Trustee Board meetings.
- To prepare the annual accounts for submission to, and to liaise with, the auditors during their annual work.
- Monitor and maintain all bank statements, transfer funds to and from bank accounts, prepare reconciliations and supporting papers.
- Ensure payroll is managed and signed off appropriately.
- Support the Trustees' Investment Policy if required.
- To prepare monthly PAYE and annual P60 forms, annual Tax Returns and Accounts and other necessary returns to be sent to the Inland Revenue & Customs, Companies House and the Charity Commission.

Experience, Knowledge and Skills

- A relevant qualification such as ACCA or equivalent.
- Strong experience of managing finance, preferably in a grant giving or charity environment.
- Self-motivated, energetic and experience and capable of working on one's own.

A self- employed contract would be considered by the Trustees.

Additional Information for employed position

Hours

The working week for this Part time post is 14 hours. However, the nature of the work will require a level of flexibility and very occasionally evening and weekend

working. There is no payment of overtime but Time off in Lieu (TOIL) is possible with the agreement of the Chairman in advance of this being required.

Leave

The annual leave entitlement for a 2 day part time role is 8 days (plus public and bank holidays) to be taken with agreement of the Chairman. It is expected that holidays will not be taken around the time when Board papers are being prepared, when Board meetings are held or when grants are being paid.

Salary

The annual salary is £15k for a 14 hour week. Salaries are paid monthly in arrears.

Pension Scheme

The Trust is prepared to support a personal pension scheme making a contribution of up to 3% of annual salary to a government-recognised scheme.

Expenses

Any personal expenses, in addition to mileage costs, incurred in the course of carrying out the duties will be reimbursed upon production of appropriate documentation.

Probation and Notice

The post is subject to a six-month probationary period and thereafter three months' notice on either side.

Location

The role will be based in Luton.

Car Owner

Mileage costs, at the rate approved by the Inland Revenue, will be paid when carrying out Trust's work and it is essential for the successful candidate to be a car owner and have a current licence.

Recruitment Process

Candidates will be required to submit a letter of application, an application form available on the Trust's website and a short statement outlining what attracts them to the role of Accounts Administrator for the Trust to nataliebriggs51@gmail.com

There will be a two-stage interview process: three Trustees will interview those candidates who are long-listed. The Board of Trustees will interview the short-listed candidates. References will be taken up before a formal offer of appointment is made.