

<b>JOB TITLE:</b>	CIOB BENEVOLENT FUND MANAGER
<b>JOB HOLDER:</b>	VACANT
<b>DATE UPDATED:</b>	DECEMBER 2020
<b>REVISION (HR Office Use):</b>	VERSION 2

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**1 MAIN PURPOSE OF THE JOB**

To manage the Institute's Benevolent Fund including developing and promoting the Fund's activities. To provide first point of contact for support, processing financial applications and referral to support services as required.

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**2 POSITION IN ORGANISATION**

Reports to the Finance Director  
Secretary to CIOB Benevolent Fund Trustee Board

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**3 DIMENSION & LIMITS OF AUTHORITY**

Individual purchases of up to £5k or contracts with budgeted total value of up to £5k over the full duration.

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**4 SKILLS & EXPERIENCE**

- Demonstrable experience within a charity or not for profit organisation, with experience of fundraising, promoting services and/or providing advice. Able to demonstrate the ability to deliver positive change and drive an organisation or activity forward.
- Strong interpersonal skills, with the ability to deal with challenging calls and emails effectively and empathetically.
- Effective communicator and listener, with the ability to build strong relationships at all levels, with customers, colleagues and external stakeholders/suppliers.
- Experienced in leading and motivating Trustees, volunteers and members to deliver required operational outcomes.
- Strong public speaker with the ability to effectively promote products or services and generate interest and donations
- Experience in administering and running effective meetings and producing clear and concise reports and minutes.
- Experienced in a variety of process and compliance-driven administrative systems
- Excellent organisational skills and the ability to independently manage and prioritise a busy and varied workload
- Demonstrable Company or Charity secretarial skills in matters relating to administration and compliance to facilitate the effective administration of the Fund.
- Strong budget and financial management skills, in the context of a charity and fundraising/donation environment
- Excellent IT skills, with knowledge of core Microsoft products including CRM, and the ability to effectively manipulate and analyse data, and translate this into business outcomes

## PART 2 : DUTIES & KEY RESPONSIBILITIES

### 5 DUTIES & KEY RESPONSIBILITIES

<b>Benevolent Fund Contact and Application Processing</b>	<b>40%</b>
<ul style="list-style-type: none"> <li>- Respond to all Benevolent Fund queries on a timely basis by email, phone and letter providing support where possible, signposting and arranging referral to external, expert support services as required.</li> <li>- Manage and administer applications for financial support within the agreed Benevolent Fund processes, ensuring these are processed sensitively and accurate records are kept.</li> <li>- Where appropriate make and communicate decisions on applications; or refer applications to the Trustees for decision within agreed timescales.</li> </ul>	
<b>Administration and Compliance</b>	<b>30%</b>
<ul style="list-style-type: none"> <li>- Manage all the administrative functions of the Fund, including management of confidential casework on the secure Server and gift aid administration.</li> <li>- Act as the key contact point and resource for the Benevolent Fund Board of Trustees, providing a full administrative and advisory role and ensuring Trustees are kept up to date on responsibilities and activity.</li> <li>- Act as Company Secretary to the Benevolent Fund Board, arranging all meetings and producing reports, papers and minutes,</li> <li>- Maintain compliance with all legal and statutory requirements. Ensure the advice and information made available to beneficiaries is at all times current and legislatively accurate.</li> <li>- Maintain accurate information on the Benevolent Fund website and other literature and undertake training as appropriate.</li> </ul>	
<b>Reporting and Financial Management</b>	<b>10%</b>
<ul style="list-style-type: none"> <li>- Produce regular reports, statistics and analysis regarding the work of the Fund and identify trends and developments that might affect the support service to members. Offer recommendations for advancement and improvement of the Fund and its services as appropriate.</li> <li>- Review and update Benevolent Fund management accounts on a monthly basis and conduct quarterly forecasting and annual budget activities, in collaboration with the Finance Team.</li> <li>- Support the timely preparation of final accounts, the annual report and input to the annual audit in collaboration with the Finance Team.</li> </ul>	
<b>Fundraising and Promotion</b>	<b>10%</b>
<ul style="list-style-type: none"> <li>- Pro-actively drive the financial sustainability of the Fund by maintaining and developing fundraising ideas and initiatives.</li> <li>- Promote the Fund, its services and fundraising activities to CIOB members on a global scale, working collaboratively with colleagues across the CIOB, particularly those in regional hubs.</li> </ul>	
<b>Liaison with Other Entities</b>	<b>10%</b>
<ul style="list-style-type: none"> <li>- Maintain excellent relationships with other Charities, statutory bodies and key stakeholders and suppliers, working effectively with them in relation to casework enquiries.</li> </ul>	

This is not an exhaustive list of responsibilities involved in the role and the CIOB reserves the right to change the scope of job in line with the operational requirements.