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| Position Title | Trust Administrator |
| Job Purpose | Run the day to day operations of the Elise Pilkington Charitable Trust ensuring the Trustees have all the information needed to make decisions to fulfil the role of the Trust whilst maintaining a professional approach with all external contacts. |
| Responsible to | Chairman of the Trustees |
| Key Responsibilities | <p>1. Dealing with Grant applications</p> <ul style="list-style-type: none"> • Review all requests received by the Trust and respond to each letter received. • Ensure that where an application meets the objectives of the Trust, the correct information is obtained for the Trustees • Compile a summary document of all applications for each Trustee meeting split into Equine and Elderly • Scan all suitable applications and upload onto Dropbox for the Trustees to be able to view as they are received. • Write to all unsuccessful applicants advising them of the Trustee's decision • Write to all successful applicants with specific details of the restricted grant • Make electronic payment to beneficiaries • Circulate thank you letters to Trustees • Follow up with all successful applicants five months after the grant is made to obtain an update on all projects for the Trustees <p>2. Arrange Trustee meetings</p> <ul style="list-style-type: none"> • Coordinate with investment manager to organize a suitable date for the Trustee meetings and communicate with all concerned • Circulate a draft agenda six weeks before each Trustee meeting for comment by the Trustees • Compile a Trustee pack for each meeting to include an agenda, previous minutes, the summary application document, all applications, all reviews of previous grant projects and all other agenda items as required • Post the Trustee pack out to the Trustees three weeks in advance of each Trustee meeting • Provide 'Chairman's' notes to ensure all points are covered in the meeting <p>3. Organise the production of Annual Report and Accounts</p> <ul style="list-style-type: none"> • Ensure that the Annual Report and Accounts are produced and filed with the Charity Commission ahead of the deadline of 10 months after the Financial year end • Collate all information required and send to accountant for the production of the Annual Report and Accounts to include Bank paying in books, cheque books, minutes of Trustee meetings, copies of all invoices and credit notes and any other misc. correspondence • Ensure draft accounts are circulated to all Trustees for review and comment • Arrange for a final copy of the Annual Report and Accounts to be included within a Trustee meeting agenda and organize sign off by the Chair of the meeting |

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| | <ul style="list-style-type: none"> • Circulate a hard copy of the final signed copy of the Annual Report and Accounts to all Trustees |
| | <p>4. Maintain the Trust's website / email accounts etc</p> <ul style="list-style-type: none"> • Ensure that the Elise Pilkington website is up to date and is accurate • Organise for new beneficiaries to be added as directed by the Trustees at each Trustee meeting • Liaise with our web host to ensure that our site remains live and is on the most suitable platform for its needs • Maintain EPT email accounts / webmail |
| | <p>5. Charity Commission guidelines</p> <ul style="list-style-type: none"> • Ensure Trustees are aware of all compliance and legislative issues • Ensure best practice is adopted by the Trustees as laid down by the Charity Commission such as: <ul style="list-style-type: none"> • Claiming of expenses • Meetings procedures • Internal Financial controls <p>6. Database of all grants</p> <ul style="list-style-type: none"> • Maintain an excel spreadsheet of all grant beneficiaries split by equine and elderly • Manipulate the data to provide information on grants to the trustees such as last five years expenditure, amount given to science based, welfare based and overseas etc. • Use the data to produce a visual mapping scattergraph showing where geographically money has been spent |
| | <p>7. Trust's bank accounts</p> <ul style="list-style-type: none"> • Look after the day to day management of the Trusts bank accounts including the transfer of money between accounts to access the best rates of interest whilst ensuring enough is available for all the Trusts requirements • Ensure the most appropriate bank account is held for the Trust's needs |
| | <p>8. Compliance</p> <ul style="list-style-type: none"> • Ensure that the Trustees are aware of all compliance issues to ensure that the Trustees act within the law in areas such as: <ul style="list-style-type: none"> • Appointing new Trustees, Deeds of Appointment • Complying with the Trust Deed • Duty of care with regards to review of Investment Manager • Declarations of interest • Claiming of expenses etc |
| | <p>9. Other duties</p> <ul style="list-style-type: none"> • Carry out any other duties appropriate to the role where required such as: <ul style="list-style-type: none"> • Ensure fully compliant with UKGDPR and ensure registration is reviewed and maintained as appropriate • Carry out reviews of Investment Manager / investment approach as required |

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| | <ul style="list-style-type: none"> • Visit Charities and other organisations as required by the Trust • Maintain files of all old correspondence as required • Maintain the EPT Library of important documents • Maintain a relationship with key contacts such as investment managers, beneficiaries, Solicitors etc. • Ensure Insurance is kept in place and reviewed periodically for suitability • Copy Trustees on any relevant information received and act upon it. • Keep Administrator's Operations manual up to date |
| Skills and Experience | <p>Office Management</p> <ul style="list-style-type: none"> • Demonstrated ability to effectively manage office operations and workflows • Skilled in maintaining and improving a variety of office systems and processes • Strong proficiency in computer systems and Office applications • Excellent administrative skills, including organisation, communication, and attention to detail |
| | <p>Planning and organisation</p> <ul style="list-style-type: none"> • Good level of personal organisation, can prioritise and effectively deliver to deadlines Strong time management skills with an ability to plan ahead, anticipate requirements, problems and obstacles, and an ability to juggle competing priorities successfully, and to work to deadlines • Ability to work on own initiative as well as comply with instructions |
| | <p>Budget management</p> <ul style="list-style-type: none"> • Produce an annual budget for trustees to approve • Able to manage finances ensuring enough money in the right place at the right time • Ensure trustees have all the required information to ensure the grants made are kept within the agreed parameters |
| | <p>Problem solving and decision making</p> <ul style="list-style-type: none"> • Ability to adopt a pro-active approach to problem solving working closely with Trustees as required. |
| | <p>Communication skills</p> <ul style="list-style-type: none"> • Excellent communication skills, both written and verbal • Attention to detail • Ensures Trustees are kept advised of all issues and steps taken to resolve so that a professional approach is maintained at all times |
| Personal specification | <ul style="list-style-type: none"> ➤ Trustworthy in all aspects of the role ➤ Self- motivated and able to work with a high degree of autonomy, delivering time critical requests on demand ➤ Commitment to the aims and objectives of The Trust ➤ Adaptable and responds well to change |