



# Clatterbridge

## Cancer Charity

<b>Job Title</b>	Finance Administrator
<b>Location</b>	Clatterbridge Cancer Centre - Liverpool, L7 8YA
<b>Reporting to</b>	Finance & Operations Manager

### About the role

Financial Administrator reporting to the Finance & Operations Manager. The role of Finance Administrator is a crucial one in our small Finance team, where the successful candidate will be responsible for maintaining financial records. This position requires strong organisational skills, an attention to detail, enthusiasm for figures and good financial practice. The Financial Administrator must be able to work independently as well as alongside the Finance & Operations Manager and Supporter Care Team.

To provide administrative support to the Fundraising Team, and to ensure smooth day to day running of the Fundraising Office. The role will build, manage and nurture relationships with supporters and the post holder will deliver by recording accurate information about donors and assisting with donor queries

This post will suit a highly organised and compassionate individual with excellent communication skills.

### Key responsibilities

#### Finance

- Preparation of income journals and recording of income onto accounting software
- Raising income invoices on the accounting software when requested
- Recording of expenditure onto accounting software
- Obtaining purchase invoice authorisation
- Create, complete, maintain purchase invoice records – purchase ledger
- Liaise with suppliers to investigate discrepancies and resolve
- Prepare weekly supplier payment run
- Weekly banking either at Clatterbridge Cancer Centre Liverpool or Wirral (alternate each week) and preparation of relevant banking paperwork for Security Plus and accounting journal
- The post holder will regularly handle and process cash and cheques
- Processing, monitoring and monthly reconciliations of bank accounts, credit cards, PayPal, JustGiving and other financial accounts
- To maintain an accurate and up to date system for distribution and monitoring of collecting tins/buckets



# Clatterbridge

## Cancer Charity

- Accrual and prepayments journals
- Daily import of income data onto Donorflex CRM system and giving sites
- Monthly reconciliation of income on Donorflex to the accounting system
- Assist with ad-hoc management reporting including transactional analysis
- General ledger maintenance
- Balance sheet reconciliations
- Assisting with annual audit process under direction of the Finance & Operations Manager
- Support and implement internal controls and champion them across the charity
- Coding of income and expenditure to the accounting software, ensuring these are within the correct budget codes
- Reporting on charity income and expenditure – including monitoring charity reserve balances and grant award balances on the accounting software
- Monitoring and reporting on the charity's Lottery membership, income and expenditure
- Contacting lottery winners
- Support the processing of gift aid claims
- To follow up income received without a gift aid declaration to maximise potential income for the charity
- Participate in appraisal and performance related meetings as requested
- Taking card payments in person and over the phone
- Undertaking any other duties of a compatible nature as may be required from time to time by management
- Grant administration work – liaising with grant award recipients, collating monitoring information and progress information
- Processing grant awards onto the accounting software
- Analyse grant awards between paid and unpaid and being aware of its current progress.
- Scanning and storing financial documents

### **Supporter Care**

- To provide friendly, efficient and professional reception service for visitors to the fundraising office - provide the first point of contact for enquiries and information regarding the charity to staff, the public and supporters
- Maintaining office systems, including data management, scanning and storing documents
- Organising and maintaining diaries and making appointments for the Senior Management Team
- Dealing with incoming email and post
- To process outgoing mail
- To develop and maintain administration procedures within the fundraising department
- To input data on donor and income database.



# Clatterbridge

## Cancer Charity

- Processing and thanking donations from a variety of different sources through our donor database
- Undertake correspondence with regular supporters and reply to requests and donations in a timely and efficient manner
- Producing reports from the data management system
- Ensuring supporter information is up to date on donor database
- Liaising with fundraising team members to ensure our donors receive information or resources they need
- To develop and maintain processes and procedures to streamline the work of the Charity, maximising the use of the database
- Being first point of contact for telephone enquires
- To answer telephone calls in agreed manner and relay accurate telephone messages, dealing with callers promptly and confidentially
- To provide excellent customer service on telephone and face to face
- To develop and maintain relationships with staff and supporters
- Assist the Fundraising Team by preparing information packs in response to enquiries from the public
- Assisting and supporting the fundraising team at events
- Provide support in the planning and preparation of fundraising events.
- To comply with the Institute of Fundraising's Codes of Practice
- Address queries and issues related to finance from staff and vendors

### Cross Team Working

- Proactively support a culture of collaborative working. Contribute to a strong team ethic within the team, supporting colleagues to work across other income disciplines for the wider benefit of the Charity and to support continued professional development.
- Liaising with the rest of the team to ensure correct income recording and reporting
- Working closely with the Marketing & PR Manager, Digital Fundraising Manager and the wider team to uphold Charity key messages, brand and tone of voice
- Utilise opportunities to promote all income streams to supporters
- Ensure team retail requirements are fulfilled.

### Insight and Analysis

- Utilise Donorflex to provide information on income as requested
- Work with the supporter care team to ensure collection, storage and use of supporter data is accurate and compliant with data protection legislation
- Providing financial information when required

### Diversity and Inclusion

- Ensure equality, diversity and inclusion are considered in all aspects of your work.



# Clatterbridge

## Cancer Charity

- Ensure all communications are made with the needs and voices of local people with cancer in mind.

### Good Practice

- Represent Clatterbridge Cancer Charity at internal and external events where required.
- Be a great advocate for the Charity and local people with cancer.
- Work in line with the Charity's values, maintaining the reputation of the Charity.
- Ensure compliance with Charity policies, Fundraising Regulator guidance and relevant legislation.
- Undertake project work as assigned by the Supporter Care Manager and Finance & Operations Manager, and any other duties appropriate to the grade of the post to help with the spreading of workload and smooth running of the department.
- Ensure that all fundraising activity supports and enhances the positive reputation of CCC.
- Develop effective relationships, both internally (Charity and CCC) and externally, that will help maximise success and create new opportunities for growth.
- Ensure safe handling of donations, including those made in cash, as and when required
- Maximise income and add value to fundraising activities by sharing knowledge, specialist expertise and best practice.
- Take responsibility for, and prioritise own workload, making decisions as required to ensure that the overall objective of meeting income targets is met.
- Sensitively assist patients, family and friends and the wider public who express a wish to support the Charity, using an awareness of the potential for distress within the hospital environment.
- Ensure mandatory training is up to date.
- Seek out and progress opportunities for personal development.
- Support the wider Charity team with their fundraising activities, e.g. events team.

This job description is not intended to be an exhaustive list of duties, but it aims to highlight the key responsibilities of the post and may be subject to review from time to time in consultation with the post-holder.



# Clatterbridge

Cancer Charity

## Person Specification

### Experience

#### Essential

- Office administration
- Experience in customer or supporter facing role
- A bookkeeping qualification or relevant experience
- Experience of financial software

#### Desirable

- QuickBooks

### Knowledge, Skills & Attitudes

#### Essential

- Proficient in use of IT, particularly Word, Excel, Outlook and Powerpoint
- Excellent communication skills being the first point of contact
- Understanding and awareness of working within brand identity guidelines
- Ability to communicate sensitively and effectively to a variety of audiences
- Accurate spelling and grammar with excellent attention to detail
- Self-motivated with good organisational skills and the ability to multi-task a range of competing priorities to meet a variety of deadlines
- A flexible approach to work and willingness to undertake some evening and weekend work to support the wider charity
- Great team working skills with the ability to work across departments

#### Desirable

- A clear understanding of standards set out by the Fundraising Regulator and GDPR
- Knowledge of the 'donor journey', including acquisition, retention, stewardship and lifetime value
- Full driving licence with use of own vehicle for business use



# Clatterbridge

Cancer Charity

## What's Next?

We hope this pack has inspired you to join our team! If you have any questions, or need more practical information, please contact:

**Recruiting Manager: Leanne Clare**  
0151 556 5566

If you've got everything you need and you're ready to apply, please send your CV and supporting statement to

**Recruiting Manager: [Leanne.Clare@nhs.net](mailto:Leanne.Clare@nhs.net)**

Your statement should give examples of how you meet the criteria of the person specification, and what you feel you would bring to this role.

Final closing date: 30 April 2024

Please note, applications may be assessed as and when they are received, and interviews arranged, so we may close the position before the closing date if a suitable candidate is found.