



**Ormiston
Families**

Brighter futures

Philanthropy Assistant Income Generation





A message from our CEO, Allan Myatt



Dear Applicant,

Thank you for your interest in the post of Philanthropy Assistant, within our Income Generation team.

As an organisation, Ormiston Families has agreed that our strategy for the next 3 years is to enable children, young people and their families to feel safer, healthier and more resilient. We also recognise that we need to build the resilience of the organisation, so we are fit to meet the challenges ahead.

Over the next few months we will continue to develop the strategy identifying key objectives for the next 3 years and making necessary organisational and operational changes to enable us to deliver the strategy in the new financial year. We see the recruitment of this post as critical in helping us achieve these objectives.

I wish you the best of luck with your application.

Best regards,

A handwritten signature in black ink, appearing to read 'Allan Myatt', written in a cursive, flowing style.

Allan Myatt



Our vision

Safe, healthy, resilient families

Our mission

Enabling families in the east of England to build resilience and make choices to improve the life chances of their children

Our values

Collaborative

- Working together with families
- Building partnerships, communities and networks to support families
- Valuing each other to achieve results and improve everything we do

Compassionate

- Listening, so we can understand
- Treating people with respect
- Enabling, recognising and reinforcing achievements

Effective

- Evidencing the impact of our work with families
- Prevention and early intervention being at the heart of our work
- Building resilience to cope and recover from adversity



Who Are Ormiston Families?

Ormiston Families is one of the leading charities working with children, young people and families in the East of England. We take early and preventative action to support families to be safe, healthy and resilient. All our services help people to build stronger networks, learn from experience and feel in control of their own wellbeing. We can only achieve this with the people who choose to work for us.

About Our Income Generation Team

We are a small and dynamic team, there is significant scope to grow and shape the philanthropy programme. The post-holder will report to and work closely with the philanthropy managers.

The philanthropy assistant is a professional individual who will support the philanthropy team to secure and maintain income from a range of supporters. The primary focus of the role will be to process donations, maintain the database, carry out prospect research and deliver high levels of customer care to our valuable supporters and event delivery/product support. The philanthropy assistant will be an enthusiastic team player, able to manage a busy and varied workload, and work well with all members of the organisation. In addition, the post holder will use their excellent communication skills to ensure that Ormiston Families' profile and impact is the very best it can be.

This is as much an internal as an external role – the post holder will need to know and understand Ormiston Families, its staff, the work they do, and the people the organisation supports.



Safer Recruitment

Application Process / Post Requirement

You must demonstrate that you meet the competencies; experience, knowledge, skills, and qualifications, that are required for this role (see Job Description below).

You must complete and submit an online application form (via the 'Work with Us' section of our website) detailing in the personal statement section, how you meet the criteria.

Rights to Work in the UK (RTW) (in person or remote)

Recruitment Manager will need to see your original documents of your Rights to Work in the UK.

- UK Passport / Full UK Birth Certificate / Drivers Licence / Utilities Bill (proof of address)
 - EUSS Permanent Status or Pre-Status Share Code
 - Current EU/EAA/Swiss Citizen Passport
 - EU/EAA/Swiss Citizen Visa
 - Home Office Certificate
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- If the interview is held in person, we will verify hard copy documents which you will need to bring with you to the interview.
 - If the interview is held remotely, you will need to email copies of your RTW documents to the Recruiting Manager before the interview. At the remote interview [Teams, Skype, Zoom] you will need to have the original hard copy documents available so the relevant checks can be undertaken.

Safeguarding and DBS Requirements for Your Role

Ormiston Families is committed to safeguarding and promoting the welfare of children, young people and adults at risk and expects all staff and volunteers to share this commitment. DBS checks or police vetting will be required for relevant posts.

Disclosure and Barring Service (DBS) Checks:

- As this position meets the definition of regulated activity under the Protection of Freedom Act 2012, appointments to this post will be subject to an enhanced DBS check with barred list check.
- Employment can commence once the check has been satisfactorily completed.
- If you have a conviction on your DBS check, an assessment of the relevance and impact of the conviction in relation to the post will be done to determine if the job offer can be confirmed.
- It is a serious criminal offence to knowingly apply for posts when you have been barred from working with children/young people and/or vulnerable adults.
- Additional questions for roles working with children, young people, or vulnerable adults to be explored at interview.
- As this post involves working either with children and young people or vulnerable adults Warner or Safer care motivational type questions may be asked during the interview process.
- These questions are asked to establish your suitability to work with vulnerable groups by understanding your attitude, behaviour, and responses to situations.
- The questions will relate to your inspiration for working with vulnerable groups, your ability to build relationships and your resilience when working with such groups and may also explore your attitude to the use of authority.
- If you feel you would find these questions about yourself difficult to respond to then you may wish to reflect upon your suitability for the post.



Disclosure

- Ormiston encourages all candidates called for interview to provide details of their criminal record at an early stage in the application process.
 - This information can be sent under separate, confidential cover to the Human Resources hr@ormistonfamilies.org.uk
 - Ormiston Families guarantees that this information will only be seen by those who need to see it as part of the recruitment process.
- Unless the nature of the position allows Ormiston Families to ask questions about your entire criminal record only questions about "unspent" convictions as defined in the Rehabilitation of Offenders Act 1974 will be asked.
- Ormiston Families will ensure that every subject of a DBS Disclosure is aware of the existence of the DBS Code of Practice and make a copy available on request.
- Ormiston Families undertakes to discuss any matter revealed in a Disclosure with the person seeking the position before withdrawing a conditional offer of employment.
- Having a criminal record will not necessarily bar you from working with Ormiston. This will depend on the nature of the position and the circumstances and background of the offences.

Qualification

- Recruitment Manager will need to see your original copies of your qualification either in person or via social media.
- If the interview is held in person, we will verify hard copy documents which you will need to bring with you to the interview.
- If the interview is held via social media, you will need to email copies of your qualification to the recruiting Manager before the interview. At the interview you will need to have the original hard copy documents available so the relevant checks can be undertaken.
- If short-listed and you are required to hold a particular qualification for a post it is your responsibility to provide the relevant certification, to prove you are suitably qualified.
- Failure to produce documentary evidence of qualifications or undertake required courses/training may result in the termination of your employment.
- If a post requires you to take training or additional qualifications then, by accepting this post, you are agreeing to do the training or take the qualifications.

References

- If appointed, we will ask you for referee details which cover your past 3 years of employment, one of which must be your current/most recent employer.

Health Check

- If appointed and to ensure the post does not have a detrimental effect on your health or your health on your work, you will have to complete a health enquiry form, and may be required to have a medical via Occupational Health.
- This is to confirm that you are able to satisfactorily carry out the post without any impact on your health (taking account of any reasonable adjustments required).
- It will be separated from your application form and will not be seen by anyone involved in recruitment to this job.



GDPR / Data Protection:

- Ormiston Families is required by law to comply with the GDPR 2018 / Data Protection Act 1998.
- Employees have an important role to play in ensuring that personal information is processed lawfully and fairly.
- Personal information is information relating to a living individual who can be identified.
- It is each individual employee's responsibility to handle all personal information properly no matter how it is collected, recorded and used, whether on paper, in a computer, or on other material.
- Personal information must not be disclosed to others unless authorised to do so.
- All personal /sensitive information will be sent to you via egress or password protected.

Equal Opportunities:

- Ormiston Families is an equal opportunities employer.
- We value diversity and welcome applications from all sections of the community.
- We ask you to complete a monitoring form to help us monitor the diversity of applicants. It will be separated from your application form and will not be seen by anyone involved in recruitment to this job.
- The gender identity, disability, marital status, ethnic origin, age, pregnancy status, religion or belief, or sexual orientation of an applicant or employee does not affect the employment opportunities made available, except as permitted by legislation.
- In addition, applicants declaring a disability who meet the minimum (essential) criteria for a vacancy will be invited for interview.
- Ormiston Families seeks to ensure that all employees are selected, trained, and promoted on the basis of ability, the requirements of the post and other similar and objective criteria.

Closing date for completed applications: 5pm, 2nd December 2021

Interview date for short listed candidates: 7th December 2021

Any queries, please email: gavin.lamb@ormistonfamilies.org.uk

Ormiston Families reserves the right to close the vacancy early if we have received sufficient applications a head of the closing date.



Information about working for Ormiston Families

JOB TITLE

Duration:

- The post advertised is permanent and can be part-time or full-time, with flexible working.

Hours of Work and Working Arrangements:

- The normal working week is 35 hours, Monday to Friday and covers 52 weeks per year.
- You will be required to work flexibly to meet the needs of the service including evenings and weekends.

Location:

- Your base will be Central Office, Ipswich & Home Based.

Salary:

- The scale for this post is grade 6, £21,928 per annum, based on 35 hours per week.
- Salary is paid in 12 equal instalments on the 25th of each month directly into your bank account and covers work carried out in the calendar month.

Progressing through your Grade:

- Your salary will rise with the scale by one increment each year up to the maximum of the scale. Increments are awarded annually on the 1st April.

Probationary Period:

- The post is subject to a probationary period of 6 months during which your progress will be monitored in accordance with agreed objectives.

Travelling Requirements for Your Role

- Ormiston Families positively encourages the use of technology to communicate and engage but in this role, you may need to travel.
- You must either hold a full and current driving licence and have access to personal transport or meet the mobility requirements of the role through other reasonable and suitable means.
- Any mileage undertaken on behalf of Ormiston Families will be paid in accordance with our Expenses Policy and within Her Majesty's Revenue and Customs guidelines.
- If you require a reasonable adjustment due to a disability to meet the travel requirements of this role, please speak with the contact detailed below.
- If you use your own vehicle for the purposes of work, you must ensure that your insurance policy covers you for this purpose.



Job Description

Job Title: Philanthropy Assistant
Service: Income Generation and Marketing
Location: Ipswich

Job purpose: The philanthropy assistant is a professional individual who will support the philanthropy team to secure and maintain income from a range of supporters. The primary focus of the role will be to process donations, maintain the database, carry out prospect research and deliver high levels of customer care to our valuable supporters and event delivery/product support. The philanthropy assistant will be an enthusiastic team player, able to manage a busy and varied workload, and work well with all members of the organisation. In addition, the post holder will use their excellent communication skills to ensure that Ormiston Families' profile and impact is the very best it can be.

This is as much an internal as an external role – the post holder will need to know and understand Ormiston Families, its staff, the work they do, and the people the organisation supports.

Main Duties and Responsibilities:

1. Administration and support

- Provide support to the income generation team on a range of administrative tasks i.e., opening and sorting post and management of collection boxes and the items listed below.
- Process one-off and regular donations from both online and offline sources ensuring procedures are followed and information is recorded correctly onto the database.
- Maintaining the Raisers Edge database, ensuring that it is accurate and up-to-date by recording changes including mailing preferences, address details and financial information – liaising with the finance team to correctly code gifts.
- Support the philanthropy managers to carry out data selections for internal and external campaigns, recording contact histories, campaign links, and source codes.
- Work with all members of the income generation team as required to ensure donations are processed correctly and supporters are thanked.
- Monitor and input monthly and ad-hoc gifts from the bank statement and complete AOIs.
- Count cash donations and bank income.
- Liaise with the philanthropy managers to ensure that regular supporters who have reached an anniversary or stopped their donations are communicated with.
- Recording bulk communications (e.g., e-newsletters) on the database.
- Ensuring we are compliant with GDPR and The Data Protection Act 2018 will be an important part of this role.
- Support the philanthropy managers with written content for newsletters, reports, presentations, and monthly reports of fundraising activity for both an internal and external audience.
- Work with the philanthropy managers to ensure tasks are correctly prioritised and deadlines are met.
- Making up and sending fundraising packs to supporters.
- Complying with all Ormiston Families policies and procedures.

2. Development

- Carry out all activities in accordance with the Fundraising Regulator's Codes of Fundraising Practice.
- Assisting with prospect and supporter research to explore new opportunities when required by philanthropy managers.



- Writing supporter/funder briefs in advance of meetings and pre and post event support (guest list management, database management and ad hoc preparation).
- Lead on London Marathon stewardship and organisation of smaller fundraising products and events.
- Working to build relationships with supporters, when required, in order to provide a high standard of customer care.
- Supporting our charity partners when required.
- Assist the philanthropy managers, when required, in thanking supporters (individuals, business and community organisations) in a timely and courteous manner and record these communications on the database.
- Attending Ormiston Families' events throughout the year, some weekend and evening work is required.
- Supporting the philanthropy managers with their volunteer engagement programme.
- Work collaboratively with the communications team to support the drafting and design of communications (e.g., newsletters, press releases and social media posts) in relation to fundraising activities.
- This is a new role, and the post-holder will have the opportunity to shape it according to their skills, interests, and diversity within fundraising.

General Duties

- To undertake any other reasonable duty, which is appropriate to the grade when requested by Senior Staff.
- To be familiar with and comply with all Ormiston Families policies, procedures, protocols and guidelines.
- To demonstrate an understanding and commitment to the charity's values.
- You may be required to conduct other tasks based on the business needs.



Person Specification

Experience:

Essential	Desirable
<ul style="list-style-type: none"> 1 year's minimum experience in a customer service role. Ideally, some of this experience would be from the not-for-profit sector. 	
<ul style="list-style-type: none"> 1 year's minimum experience using customer/supporter databases. Ideally, some of this experience would be from the not-for-profit sector. 	

Abilities and Knowledge

Essential	Desirable
<ul style="list-style-type: none"> Excellent interpersonal skills 	
<ul style="list-style-type: none"> Strong communications skills, both written and oral. 	
<ul style="list-style-type: none"> Good organisational skills 	
<ul style="list-style-type: none"> High level of numeracy skills. 	
<ul style="list-style-type: none"> IT literacy. 	
<ul style="list-style-type: none"> Ability to work under pressure. 	
<ul style="list-style-type: none"> Ability to work unsupervised. 	
<ul style="list-style-type: none"> Ability to work flexibly on own initiative and as part of a team, supporting fellow team members. 	
<ul style="list-style-type: none"> A positive, proactive approach to work and a good team player. 	
<ul style="list-style-type: none"> A good understanding of the GDPR and the Data Protection Act 2018 	
<ul style="list-style-type: none"> Ability to project the vision of Ormiston Families. 	
<ul style="list-style-type: none"> Ability to diversify on an ad-hoc basis. 	

Professional and Personal Development

- All staff must ensure that they are aware of their responsibilities by attending Mandatory Training and Induction programme.
- All staff will have a formal appraisal with their manager at least every 12 months. Once performance/training objectives have been set, the staff member's progress will be reviewed on a regular basis so that new objectives can be agreed and set, in order to maintain progress in the service delivery.



- All staff will be expected to take responsibility for their own professional development and will be supported to achieve development opportunities as appropriate.

Health and Safety

- All staff have a responsibility to maintain health and safety of self and others within the performance of duties in accordance with health and safety policies, and to undertake specific health and safety responsibilities as directed. All staff have a responsibility to adhere to the Risk Management Policies & Procedures.
- All staff are required to contribute to the control of risk, and must report immediately any incident, accident or near miss involving service users, carers, staff, contractors or members of the public.

Confidentiality and Information Governance

- All staff may gain or have access to confidential information about the assessment and/or treatment of service users, information affecting the public, private or work related staff information, or Charity matters. A breach of confidentiality will have occurred where any such information has been divulged, passed (deliberately or accidentally) or overheard by any unauthorised person or person(s). Breaches of confidentiality can result in disciplinary action, which may involve dismissal.
- All staff must maintain a high standard of quality in corporate and clinical record keeping, ensuring information is always recorded accurately, appropriately and kept up to date. Staff must only access information, whether paper, electronic or in other media which is authorised to them as part of their duties.
- All staff must ensure compliance with the Data Protection Act 1998.

Safeguarding: Adults and Children (Section 11 of the Children Act 2004)

- Every member of staff has a responsibility to be aware of and follow at all times, the relevant national and local policy in relation to safeguarding children and safeguarding adults.
- Safeguarding and DBS requirements for your role:
- Ormiston Families is committed to safeguarding and promoting the welfare of children, young people and adults at risk and expects all staff and volunteers to share this commitment. DBS checks or police vetting will be required for relevant posts.

Senior Managers

- Under Section 11 of the Children Act senior managers have responsibility for ensuring that service developments take into account the promotion of welfare and is informed by the views of children and families; providing training on safeguarding for all staff; recruiting safely; ensuring there is effective inter-agency working and information sharing.

Freedom of Information (FOI)

- All members of staff must be aware of their responsibilities under the Freedom of Information (FOI) Act 2000. The Act gives individuals or organisations the right to request information held by the Charity. Staff must manage information they hold in such a way that meets the requirements of the Act. All requests for disclosures under the Act must be passed to the Freedom of information Officer.



Data Quality

- The Charity recognises the role of reliable information in the delivery & development of its services and in assuring robust clinical and corporate governance. Data quality is central to this and the availability of complete, comprehensive, accurate and timely data is an essential component in the provision of high-quality mental health services. It is therefore the responsibility of all staff to ensure that where appropriate, information is recorded, at all times, in line with the Charity's Policy and Procedures for Data Quality.
- This job description seeks to provide an outline of the duties and responsibilities of the post. It is not a definitive document and does not form part of the main statement of Terms and Conditions. The job description will be reviewed as part of the annual appraisal process and will be used as the basis for setting objectives.



Benefits & Recognition

All benefits are discretionary, and Ormiston Families reserves the right to change or amend benefits at any given time.

Cycle to Work:

- Cycle to Work allows you to order a new bike, equipment or both up to the value of £1,000 which you can pay back through your salary to make tax savings.

Annual Leave Entitlement:

- The basic annual leave entitlement is 27 days plus additional leave for employees who have completed 3 years' service up to a maximum of 30 days as follows:
- Part-time employees receive a pro-rata allowance according to the number of hours they work (per week).

Group Life Assurance:

- Ormiston Families provides a death in service benefit to all permanent employees.

Occupational Sick Pay Scheme:

- Ormiston Families operates an occupational sick pay scheme in addition to statutory sick pay.

Pension:

- Ormiston Families provides a Group Personal Pension Scheme with up to 9% of gross salary employer contribution for any employee where they match the level of contribution.

Sponsorship:

- Ormiston Families provides sponsorship to employees who have completed their probationary and been in post for at least 12 months to undertake nationally accredited or chartered certification awarded by professional associations.

Employee Assistance Programme:

- Ormiston Families provides a comprehensive employee assistance programme which offers free and confidential access to telephone and face to face counselling (up to 6 sessions), financial and legal advice and assistance in finding information about a wide range of subjects from childcare to moving to a new house.

The Hive:

- The Hive is a savings platform which can be accessed by employees to make everyday purchases at reduced costs. Employees can save money by purchasing reloadable cards, obtain cashback through online purchases, and make savings in some stores.

The Well-being Centre:

- Accessed via The Hive, the Wellbeing Centre provides education, support and tools to help you live a healthier and happier life.