

## JOB SUMMARY AND PERSON SPECIFICATION

**Job Title:** Income Processing Assistant

**Reports to:** Income Processing Manager

**Based at:** Downton / Remote

<b>Job Purpose</b>	Working as part of a team to ensure efficient and effective processing of income from various sources, ensuring the charity's procedure for allocating and coding of income is followed to ensure timely and efficient downloading into the accounts system.
<b>Accountabilities</b>	<ul style="list-style-type: none"><li>• Processing of charity donations and using sound judgment to make decisions to ensure the correct allocation of income.</li><li>• To ensure constituents are set up &amp; updated in Donorfy system, in line with defined organisational procedures to allow the supporter journey, and excellent supporter care.</li><li>• Add appropriate 'Tags' when necessary to ensure correct thanking and to support stewardship.</li><li>• To ensure all Gift Aid is claimed on eligible donations. Maximising income for the charity.</li><li>• Working with fundraising colleagues on new income streams to understand and agree financial data required for Donorfy.</li></ul>
<b>Main Responsibilities</b>	<ul style="list-style-type: none"><li>• Scanning of financial post for all cash and cheques for daily processing into Donorfy.</li><li>• Reconcile cheques and cash to batch and prepare for banking ready for collection.</li><li>• Downloading of income from 3<sup>rd</sup> party sites and preparing for importing into Donorfy.</li><li>• Import of multiple daily payment files into Donorfy, ensuring every payment line is correctly allocated, and soft credits and connections are added where appropriate.</li><li>• Managing workload in line with finance mid- month and month end dates, ready for the accounts download into Exchequer.</li><li>• Ensure all income amendments are managed as part of the days processing following organisational processes.</li><li>• To ensure the correct 'acknowledgment tags' are added to constituents when processing income when required, allowing correct departments to acknowledge the supporter's donation.</li><li>• To ensure that all emails into Income Processing are responded to in line with the departments KPI and recording into data base when appropriate.</li></ul>

	<ul style="list-style-type: none"> <li>• All payment information forms/emails/calls to be processed as per daily processing.</li> <li>• Uphold good internal working relationships with stakeholders at all levels with regards income data, ensuring key information is escalated within the appropriate timeline.</li> <li>• Maintain electronic databases and paper systems in accordance with procedures to ensure accuracy of information and efficiency.</li> <li>• To ensure that all appropriate steps are taken to correctly identify transactions when searching to identify these for either supporter or internal contacts.</li> <li>• To ensure compliance is followed with all fundraising cash and cheque handling procedures across all of income operations and reporting any concerns to line management.</li> <li>• To conduct bulk cash counts from collections, ensure precise recording of income before updating Donorfy.</li> <li>• Banking of cash and cheque income on assigned days.</li> <li>• To ensure all eligible Gift Aid donations are identified ready for claiming via HMRC.</li> <li>• Ensure new standing order pledges are identified within the bank statement and set up appropriately.</li> <li>• Provide an excellent level of support to our volunteer network especially regards donations and Gift Aid correspondence.</li> </ul> <p>In addition to your main duties, you may also be required to perform other duties from time to time within your capabilities as directed by your line manager</p>
<b>Essential Knowledge, Skills &amp; Experience</b>	<ul style="list-style-type: none"> <li>• GCSE Mathematics or equivalent</li> <li>• GCSE English Language or equivalent</li> <li>• 2 years' experience of using Microsoft Excel</li> </ul>
<b>Desirable Knowledge, Skills &amp; Experience</b>	<ul style="list-style-type: none"> <li>• Income processing experience, preferably using CRM software.</li> <li>• Excellent IT skills, including Word and Excel.</li> <li>• Data entry experience.</li> <li>• Numeracy skills</li> <li>• Good organisation skills with the ability to prioritise.</li> <li>• Attention to detail in all aspects of work.</li> <li>• Excellent verbal communications at all levels with good written communication skills</li> <li>• An effective team player</li> </ul>
<b>Key Competencies &amp; Behaviours</b>	<ul style="list-style-type: none"> <li>• Confident and polite manner</li> <li>• Ability to build rapport quickly and to understand needs and expectations.</li> <li>• Positive, empathetic, patient, polite and friendly manner</li> <li>• Ability to remain calm under pressure.</li> <li>• Displays the highest levels of integrity, confidentiality, and commitment.</li> <li>• Respond quickly to changing demands and demonstrate strong skills in prioritisation and time management.</li> </ul>

	<ul style="list-style-type: none"> <li>• Work within a range of environments and working cultures, adapting personal style accordingly.</li> <li>• Lead and drive work forward with minimal direction</li> <li>• Analyse information quickly and communicate in a concise and articulate manner.</li> <li>• Well organised with the ability to prioritise.</li> <li>• Demonstrates an ability to work as part of a team and be a flexible team player.</li> <li>• Demonstrates self-motivation.</li> <li>• Flexible re. hours of work</li> </ul> <p>Model our Values. We are:</p> <ul style="list-style-type: none"> <li>• Innovative-Collaborative-Authentic-Resourceful-Energetic</li> </ul>
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I have read and understood the Job Description:

PRINT NAME: .....

SIGNED: .....

DATE: .....