LICENSED TRADE CHARITY

Registered Charity No. 230011
Patron: H.R.H. The Prince Philip, Duke of Edinburgh, KG, KT

Job Description

Role: **Charity Services Advisor**

Reporting to: Deputy Manager – Charity Services Team

Department: Charity Services Team – Licensed Trade Charity

Hours: 35 hours a week - full time post

Key responsibilities and tasks

1 To provide telephone support and advice to applicants and referring agencies on our services, and signpost to partner organisations that can help...

2 Deliver excellent standards of customer service.

3 Collect and process information from applicants to present to our Charity Committee for consideration and potential award of a grant.

4 Compile appropriate notes for our Volunteers to enable them to visit applicants and write up assessment reports to submit to our committee.

5 Maintain and manage our CRM system, ensuring accuracy and confidentiality of information

6 Ensure that all processes and procedures comply with GDPR legislation

7 Prepare information and case notes for use in Charity Services committee meetings.

8 Once grants are awarded, provide the paperwork needed so that grant payments can be made. Liaise with suppliers to provide goods and services to our grant applicants.

9 Assist in producing figures and statistics for meetings and reporting purposes. To look at trends and report on spend to present at meetings or in reports.

10 To provide cover in booking assessments with volunteers when the Volunteer Manager is on holiday/absent.

11 To represent the organisation at events and conferences to raise awareness of the charity and its work.

12 To support the Charity Service and Marketing teams to account manage the

large number of pub companies and breweries that we work with. To raise and maintain awareness of what we do, and let them know about new services.

13 Other administrative duties related to this job.

14 To occasionally change hours if required providing cover when staff are absent.

15 To be able to travel to exhibitions, events and pub companies to make presentations, and make people aware of what we do. (this could include an overnight stay)

Person Specification

The person appointed will be able to demonstrate the following experience, skills and abilities:

Essential	**Desirable**
Front line experience of dealing with clients, who have experienced issues with illness, mental health, debt, homelessness, and isolation.	Experience of dealing and liaising with a helpline provider, to ensure we maintain high standards of customer service.
Knowledge of the benefits system, and experience of organisations that are able to provide support for finance and debt issues.	Willingness and experience of making presentations to raise awareness amongst third party organisations to increase the amount of referrals received.
Able to problem solve and make independent decisions.	Ability to look and recommend other services that may benefit our applicants.
Excellent communication skills. The role involves communicating with people on all levels including those who have experienced some tough times.	Experience of account management in a corporate environment.
Ability to work both independently, but also as part of a team	Knowledge of a CRM system for either applicants or corporates
Experience of maintaining and managing a database	

Competent in the use of Microsoft Office – Word, Excel and Power Point, as well as in the use of email and the internet.	
Knowledge of housing legislation and procedures, dealing with local authorities etc.	
Experience of working in a team. Our team consists of 5 members.	
Able to produce statistics and reports to look at trends and act upon the results.	

Approved by: **(line manager)**	
Date approved:	
Post Holder:	