

Job Description

Executive Officer

Life Education Trust Western Bay of Plenty Region

Purpose of the Position

The Executive Officer plays a key role in the effective operation of the Trust by enabling the Trustees' limited volunteer time to be as effective as possible.

The Executive Officer will undertake grant and donation requests consistent with the annual plan to ensure annual budget targets are met. Local sponsor events and events that profile the Life Education brand will see the Trustees requiring the Executive Officer to lead the planning and preparation as required to ensure these are successful.

Position reports to: Chairperson, Life Education Trust Western Bay of Plenty Region, or delegate.

Hours of work: Up to 60 hours per month at an average 15 hours per week.
Note that the Executive Officer hours are flexible based around the needs of events but recognizes that most work is normal business hours. An average week would see:

10 - 12 hours between 9am and 5pm

3 - 5 hours in the weekend or after 5pm

Personal qualities:

- Self-motivation – the Executive Officer must be a self-starter;
- Strong written and oral communication skills;
- Effective time management;
- Ability to work to deadlines and under pressure;
- Commitment to the philosophy and vision of Life Education Trust;
- Ability to relate to a wide range of people.

Key Competencies:

- Understanding of grants, charitable donations and philanthropy;
- Financial reporting;
- Annual planning and reporting against plans.

Responsibilities



FUNDRAISING AND SPONSORSHIP

Grants and Charitable donations

- To prepare an annual grant application plan identifying organisations, application purposes monthly to support the Trust's annual budget and cash flow plan;
- To undertake all grant applications identified in the plan and any other grant or philanthropic donation opportunities identified;
- To administer approved grants, including providing information required by grant funders, and in particular audit reports and proof of spending;
- To monitor and provide regular reports to Trustees (monthly meeting) against the plan;
- To attend community meetings in regards to funding applications and ensure the Trustees are kept informed of changes in the charitable or funding sector;
- To maintain information required by the Charities Commission.

Local donors and supporters

- To seek out new sponsors and to negotiate sponsorship partnerships that are beneficial to both parties with a process where Trustees are engaged in any discussions that progress;
- To administer and build membership for LET Harold Club together with Trustees to actively work to increase the Harold Club membership;
- To work with trustees in planning and organizing fundraising events each year;
- To attend all fundraising functions and assist in the host role, or any other role, as necessary.

PUBLIC RELATIONS and PROMOTION

- To identify and report to Trustees of opportunities to promote Life Education Trust and its work to the business community, service groups, and other relevant parties;
- To liaise with local media to ensure that Life Education Trust has a high profile in the community;
- To acknowledge sponsors and develop a positive relationship with all funders and supporters to ensure they are engaged by implementing regular but effective communication initiatives. This might include newsletters, thank you acknowledgements, website and media.
- To lead the trust with the development of securing revenue yearly for advertising on the classroom (if space is available).

ADMINISTRATION

- To provide administrative support to the trustees as required to assist with initiatives the Trust agrees to undertake;
- To liaise with the trust's educators, providing them with administrative support as appropriate (while keeping in mind the educators' role description and tasks);
- To process Trust correspondence - postal and email;
- To ensure that Big Harold is maintained and cleaned as required;

- To maintain a useful and current filing system and to archive material as necessary.



SERVICING MEETINGS

- To put together and circulate to trustees an agenda and relevant reports, to be distributed at least three days prior to each monthly trust meeting;
- To liaise with the chairperson prior to producing each agenda;
- To minute all meetings thoroughly and to circulate minutes to trustees as soon as possible after each meeting;
- To provide an executive officer's report, updating trustees on the status of funding applications and on any other matters of note, for each meeting;
- To carry out all actions required between meetings.
- To ensure all trustees and educators are updated on essential information regularly.

FINANCIAL MANAGEMENT and BUSINESS PLANNING

- To work with trustees and in particular the trust accountant, to establish a budget and grant application / fundraising plan.
- To process accounts on Xero for payment by loading these on to the online banking system – on a once per month basis unless payment is required outside this cycle;
- Debtors and invoicing to be undertaken:
 - Monthly billing cycle of 20th month for schools, any regular donors, etc;
 - Harold Club spreadsheet to be updated monthly from bank statements;
 - Harold Club regular donors to be receipted annually for their tax purposes, unless a donor requires otherwise;
 - The CRM has a debtors programme for invoicing schools (the educators do this);
 - Follow up of any receipts outstanding.
- To maintain thorough petty cash records.
- To liaise with the trust accountant so that a monthly financial report is available for at each monthly trust meeting.
- Processing of fortnightly payroll for Educators.
- Processing of PAYE and GST returns to IRD.
- Reconciliation and maintenance of all bank accounts.
- To work with the trust treasurer, accountant and auditor to process Annual Financial Accounts and complete annual audit work.

OTHER DUTIES

- To cope with changing work patterns and to ensure efficient utilisation of labour and resources, the Executive Officer will undertake essential duties, in addition to those listed above, as requested by Life Education Trust.