



# Epsom Girls Grammar School

## FOUNDATION OFFICE COORDINATOR

*Vision: Enabling students to be confident, active, resilient learners*

Epsom Girls Grammar School is a leading New Zealand school founded on traditions of service and commitment to girls' education and focused on developing young women to become confident and resilient learners, actively contributing to their communities.

*Values: Courage Compassion, curiosity, community*

## POSITION DESCRIPTION

The Epsom Girls Grammar School Foundation was established in 1999, helping foster and grow the EGGS community. The Foundation is an Incorporated Charitable Trust governed by independent Trustees who have a particular focus on helping the School and students continue to succeed. The Foundation supports the fundraising projects of the School, as well as managing, administering the funds raised, and endowments gifted to the School. The Foundation also financially assists students, staff, sport and cultural groups through the Heritage Fund and the annual endowment awards.

## MAIN PURPOSE OF POSITION

The role of the Foundation Office Coordinator is to organise, coordinate office administrative tasks and duties, providing the necessary support and assistance to the Foundation and Trustees, and ensure smooth running of the day-to-day functions of the Foundation Office. The role also ensures high levels of collaboration creating enduring partnerships and contributing positively to the School.

**Accountable to:** Foundation Chair/relevant Deputy Principal (matrix management structure)

**Direct Reports:** Nil

## KEY AREAS OF ACCOUNTABILITY

- Effective operation of the Foundation Office
- Foundation Trustee support
- Events and fundraising management
- Grant and donor applications
- Investments/finance/tax/audit - management and reporting
- Awards and scholarships
- Relationship management
- Systems and process management (Google Suite, eLearn, Fundraiser, Xero, KAMAR etc)

KEY ACCOUNTABILITY	RESULTS/STANDARDS EXPECTED
<b>Foundation Office Operation</b>	<ul style="list-style-type: none"> <li>• Key liaison and point of contact for the Foundation office</li> <li>• Be the ‘face’ of the Foundation office, ensuring all interactions positively represent and promote the Foundation Office and School</li> <li>• Receive, coordinate and organise all Foundation communication e.g. telephone calls, emails, letters to individuals and groups</li> <li>• Handle, assist and resolve/complete queries and assigned tasks</li> <li>• Organise and maintain information effectively, both electronic and paper files</li> <li>• Prepare and present the Foundation report for the Trustees at bi-monthly Foundation meeting</li> <li>• Act as designated Foundation Trustees secretary <ul style="list-style-type: none"> <li>○ Book Boardroom</li> <li>○ Ensure paperwork distributed to Trustees/meeting attendees one week prior to the meeting (agenda, previous minutes, investment portfolio monthly/quarterly reports, Xero reports etc). Print additional copies of paperwork for meeting.</li> <li>○ Utilise laptop in meeting to take minutes and ensure minutes are circulated to Chair for editing and sign off in a timely manner (following week)</li> <li>○ Ensure finalised minutes are sent to Board Secretary for inclusion in Board Papers within 7 School days</li> </ul> </li> <li>• Seek to continuously improve work flows, processes and procedures in relation to the effective running of the office</li> <li>• Conduct an ongoing review and updating of records, files, documents and EGS website</li> <li>• Provide assistance with compiling the School documents as and when required e.g. School, wall planner</li> <li>• Act as the Foundation awards/scholarship liaison with Foundation Trustees, School, student and staff involved</li> <li>• Provide support for roles appointed by the Foundation periodically e.g. Capital Campaign, Communications, Development Manager etc</li> <li>• Order office supplies and monitor inventory/stationery</li> <li>• Read, understand and comply with all relevant School policies and procedures</li> </ul>
<b>Foundation Trustee Support</b>	<ul style="list-style-type: none"> <li>• In liaison with the Foundation Trustees, ensure an appropriate governance framework exists</li> <li>• Ensure the appropriate compliance and control processes are up to date, including necessary paperwork signed and submitted</li> <li>• Coordinate the Foundation Trustee meetings and Fundraising sub-committee meetings including preparation of agendas and minute taking</li> <li>• Submit a bi-monthly report to the Trustees on all Foundation office activities, including finance and investment update and key actions</li> <li>• Prepare Foundation invoices to be paid for Trustee approval. Ensure payments already made are presented to the Trustees for approval at the Foundation meeting</li> <li>• Ensure all details are recorded in the Foundation report prepared for the meeting and approval for payment is recorded in the minutes.</li> </ul> <p><b>Charities Commission</b></p> <ul style="list-style-type: none"> <li>• Manage and update records held with the Charities Commission (Trustee changes etc)</li> <li>• Ensure the Charities Commission annual return is filed (online)</li> </ul>

<p><b>Grant Applications</b></p>	<ul style="list-style-type: none"> <li>• Develop and implement an annual funder strategy with Grants, Foundations and Trusts</li> <li>• Keep up to date with Societies that make grants within the EGGs Territorial Local Authority (TLA) and develop, manage and maintain strong relationships with funders and other funders outside the area as necessary</li> <li>• Establish, maintain and update a current register of Trusts and Foundations</li> <li>• Working in liaison with the Business Manager, identify non-Budget items required (untagged requested items from Budget round)</li> <li>• Create a priorities schedule</li> <li>• Submit frequent applications to funders (minimum 1/fortnight)</li> <li>• Assist functional area to complete funding audit requirements as necessary (if Grant application approved)</li> <li>• Ensure necessary reports and paperwork is furnished to accountants for auditing and file return purposes</li> <li>• Ensure files are up to date with all applications made (approved or declined)</li> </ul>
<p><b>Financial and Fund Management</b></p>	<ul style="list-style-type: none"> <li>• Work with the external accountant (Dcipher) to ensure Foundation accounts are accurate and well managed</li> <li>• Monitor transactions to ensure the monthly accounts are in alignment with expectations</li> <li>• Ensure financial and investment fund reports are compiled, completed on time and accurate as directed by the Trustees with effective reporting and analysis/narrative of the numbers</li> <li>• Provide Foundation Trustees with financial reports generated from Xero for inclusion in Foundation meeting pack (or as requested) e.g. transaction report for the period, balance sheet etc.</li> <li>• Advise the Foundation of large transactions, with background</li> <li>• Compile information for the Foundation annual accounts/returns and working closely with the School finance department</li> <li>• Prepare information for accounts and auditors ensuring effective reporting and analysis/narrative of the numbers</li> <li>• Returns completed and furnished on time so as not to incur any late fines or penalties e.g. GST, Companies, Charity Commission</li> <li>• Monitor and maintain Foundation Xero account – ensuring transactions (payments and receivables) are coded correctly.</li> <li>• Ensure invoices are raised in Xero in a timely manner for all monies owed to the Foundation (internally and externally)</li> <li>• Bank and receipt all benefactions, requesting payments as required.</li> <li>• Payments made via cash or cheques to the Foundation must be deposited directly with the bank in a timely manner. Cash must not be held under any circumstances.</li> <li>• Liaise with School finance/accounts department to confirm and process transactions as required</li> <li>• Assist with completion of necessary statistical and audit reports as requested</li> <li>• Ensure information held by the Companies office is up to date e.g. Trustee names and details</li> </ul> <p><b><u>Investment Fund Management</u></b></p> <p>The Foundation has funds invested and managed by Forsyth Barr. The portfolio consists of Endowed Funds, EGGs Heritage Fund, EGGs Sport Council funds and others.</p>

	<ul style="list-style-type: none"> <li>• Act as the liaison with Fund Manager ensuring the required reports are generated for review by the Trustees and saved in Xero for access by the accountants</li> <li>• Oversee and initiate any transfer of funds as required, at the direction of the Trustees</li> </ul> <p><b>Endowed Funds</b></p> <ul style="list-style-type: none"> <li>• Basic accounting functions are undertaken to ensure funds are accounted for and correctly allocated to recipients</li> <li>• In conjunction with the Trustee representatives, ensure accurate record keeping in excel of the Endowed Funds held in the managed investment portfolio (Forsyth Barr)</li> <li>• Liaise with Foundation accountant to ensure the investment fund analysis and record keeping is on time and accurate</li> </ul>
<p><b>Fundraising and events</b></p>	<ul style="list-style-type: none"> <li>• Develop and implement an annual fundraising strategy</li> <li>• Lead and coordinate the annual parent/supporter giving campaign with the aim achieving the financial targets set</li> <li>• Assisting with the planning and coordination of fundraising events and School activities as required e.g. <ul style="list-style-type: none"> <li>○ Direct mail appeals</li> <li>○ Movie nights, social gatherings, auctions, other School events</li> <li>○ Entertainment Books liaison (as required)</li> <li>○ Timeless Photography (formerly Michael Overend) Fundraiser (as required)</li> <li>○ Any other Fundraising initiatives/activities</li> </ul> </li> <li>• Administrative support for events in conjunction with the Capital campaigns <ul style="list-style-type: none"> <li>○ Invitation lists/replies/collation</li> <li>○ Operational support</li> </ul> </li> <li>• Planning, coordination and communication for Foundation subcommittees e.g. Fundraising - setting the agenda, minute taking, assisting with Budget setting etc</li> <li>• Assist with the organisation of events in support of any capital campaign - planning, administration, communication, fundraising and event occasions</li> <li>• Assistance and support with any capital campaigns – PA to Senior Fundraiser (when appointed)</li> <li>• Conduct post event evaluation of fundraising opportunity outlining areas for improvement and recommendations</li> </ul>
<p><b>Systems Management</b></p>	<ul style="list-style-type: none"> <li>• Work to identify procedural and operational improvements as required</li> <li>• Establish and maintain a Shared Google Drive environment for all Foundation documents</li> <li>• Manage and develop the fundraising department’s database (Fundraiser) of past and present students, alumni, community groups, supporters and potential and current benefactors - including keeping all data updated (email addresses, personal information etc), accessing groups and lists, follow up calls and research.</li> <li>• Donor input to Fundraiser, letters and receipts input</li> <li>• Confirm Alumnae information held in the database as required e.g. for enrolment purposes, work verifications etc</li> <li>• Select and retrieve relevant information from the data base to support fundraising strategies</li> <li>• Create CSV files and retrieve/download data from Fundraiser as requested</li> <li>• Assist in the identification and research of potential benefactors</li> </ul>

	<ul style="list-style-type: none"> <li>• Prepare Statement of Accuracy as required for Infosoft (software developer for Fundraiser) to sign for NZ Post mail outs at the beginning of the year</li> <li>• Establish a sound working knowledge of all School based programs and systems and understand how to effectively use to enhance the Foundation office value e.g. Fundraiser, website, e Learn</li> </ul>
<b>Prizes, awards and scholarships</b>	<ul style="list-style-type: none"> <li>• Facilitate the annual sign off and approval process for the award and scholarship financial pool available with Foundation Trustees</li> <li>• Facilitate the transactions/cheques to award/scholarship recipients once agreed with the School</li> <li>• Ensure benefactors are advised and funds received if required</li> </ul> <p><b>EGGS Heritage Fund</b></p> <ul style="list-style-type: none"> <li>• Act as central point of contact for applicants</li> <li>• Administering the Heritage Fund three times a year (Fund held in the Forsyth Barr portfolio)</li> <li>• Ensure appropriate awareness and advertising of the Heritage Fund and deadlines within the School</li> <li>• Coordinate applications and prepare the information for the SLT to consider and approve</li> <li>• Maintain accurate historical information</li> <li>• Update the successful Heritage Fund applications on the EGGS</li> </ul>
<b>Relationship Management</b>	<ul style="list-style-type: none"> <li>• Seek to add value by developing positive and strategic relationships with internal and external stakeholders to grow a network and culture of philanthropy for the Foundation and the School</li> <li>• Cultivate new supporters as well as looking after existing donors through outstanding relationship management, stewardship and support</li> <li>• To communicate effectively with staff, students, parents, Old Girls and the wider School community</li> <li>• Establish lasting professional relationships with pertinent community organisations to network and develop as strategic/commercial partners</li> <li>• Work collaboratively with all members of the Foundation, Old Girls Association and capital campaign (as required)</li> <li>• Assisting in the identification and research of potential benefactors</li> <li>• Assisting with the organisation of communications and events in support of the Foundation</li> <li>• Positive, supportive team relationship established to ensure smooth running of the Foundation Office</li> </ul>

**KEY PERSON COMPETENCIES:**

**Adhering to Principles and Values**

Upholds ethics and values; demonstrates integrity; promotes and defends equal opportunities, is widely trusted; maintains confidences.

**Relationship management**

Relates well to all kinds of people. Builds appropriate rapport creating stable, enduring relationships and ensures that the customer (Internally and externally) perspective is behind all value-added business activities. Has the ability to work with internal and external stakeholders to develop unique solutions and shares information openly and involve the stakeholder in decision-making.

**Technical ability**

Has the ability and drive to work with complex concepts and new information quickly; develops solutions from first principles; Logical thinking to develop objective strategies and concepts.

**Planning**

Accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks, measures performance against goals; evaluates results.

**Process Management**

Good at working out the processes necessary to get things done; knows how to organise people and activities; understand how to separate and combine task into efficient work flow; knows what to measure and how to measure it; can see opportunities for synergy and integration; can simplify complex processes; gets more out of fewer resources.

**Organising**

Can marshal resources (people, funding, material, support) to get things done; can orchestrate multiple activities at once to accomplish a goal, uses resources effectively and efficiently; arranges information and files in a useful manner; excellent at critically analysing and evaluating all possibilities; solution orientated.

**Written communication**

Is able to write clearly and succinctly in a variety of communication settings and styles; can get messages across that have the desired effect.

**Ability to adapt to change**

Comfortable with change and shifting priorities; challenges constructively; flexible and open to change; solutions based, creating focus; easily makes the transitions to the new and different; can handle conflict even-handedly; is open to the views of others.

**Coping with Pressure and Setbacks**

Maintains a positive outlook at work; works productively in a pressurised environment; maintains a sense of calm in challenging situations; handles feedback well and learns from it; balances the demands of a work life and a personal life.

**PERSON SPECIFICATION**

- Knowledge of office administrator responsibilities, systems and procedures
- Proficient in Cloud based document storage e.g. Google Suite etc
- Proficient in MS Office (MS Excel; MS Powerpoint; MS Outlook, Outlook and Office 365 in particular)
- Understands and is familiar with working in a matrix management structure environment
- Fundraising stewardship and relationship management experience across a diverse portfolio
- Strong financial and accounting understanding with sound results orientation
- Proficient with email scheduling tools, spreadsheets and databases
- Excellent time management skills and ability to multi-task and prioritize work
- Attention to detail and problem-solving skills
- Excellent written and verbal communication skills
- Accurate data entry and high-level attention to detail
- A creative mind with an ability to suggest improvements

**ACCEPTANCE:**

This role profile is a guide to the work you will initially be required to undertake. It may be changed from time to time to incorporate changing circumstances, and you may be required to be flexible and perform other duties as required. Please sign and print name below to confirm receipt of your Position description.

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_