



## Personal Assistant (PA) to the Director of Development (DoD)

### Post Overview with Enhanced Detail Task List

#### Introduction

With its auspicious founding by King Edward VI of England in a Royal Charter of 1552, subsequent identification as one of the 'Great Nine' Public Schools by the Royal Clarendon Commission in 1861, and its placement in the Public Schools Act of 1868: Shrewsbury School enjoys a 150 acre site on the south bank of the River Severn, to which it moved in 1882. More recently, it is one of the eighteen British Public Schools of the prestigious Rugby Group formed in the 1960s, and furthermore one of the 12 of the 500 Club, one of the G30 Schools, and a Founding Member of the School Partnerships Alliance of 2021.

The foresight of the administration of Shrewsbury School brought about the establishment in 1965 of the Shrewsbury School Foundation. It is thought to be the first such charitable foundation associated with a British Independent School, and to this day the Foundation exists to create, support and enhance the provisions of the School, including its commitment to the provision of Means Tested Bursaries, and also to fund a number of capital projects, keeping the School at the forefront of independent education worldwide. In recent years, through the generosity of alumni, parents, friends and supporters, the Gemini Pool, GMR Cricket Centre, Worth Fives Courts, Yale Boat House, Hodgson Hall, Chatri Design Centre, Moser Library, and Barnes Theatre have all been enabled by means of philanthropy.

The Development Office is the professional administrative office of the School which supports and enables the philanthropic and global community engagement strands of the School's ten year strategy to 2030: *Shrewsbury For Life*; and contributes to wider administrative initiatives for institutional advancement. The fundraising activities of the Development Office are directed wholly to the Shrewsbury School Foundation.

The School organises its fundraising into ten year campaigns. Since 2020, the Development Office has secured in excess of £12m in cash gifts and pledges for Campaign 2020 – 2030, and is humbled by the generosity of its donors, serving the aspiration to increase the number of young people attending the School who would be able to take full advantage of the unique opportunity a Shrewsbury education can provide, were it not for their financial circumstances.

*Shrewsbury For Life* has strengthened our focus on social responsibility, and we are seeking to increase the number of Transformative Means Tested Bursaries the Shrewsbury School Foundation is able to offer. Our definition of Transformative Means Tested Bursaries is those which enable young people requiring 75% – 110% remission of fees to attend the School.

The mission of the Development Office is to strengthen the School's position as one of the finest coeducational boarding schools in the country with a powerful global reach. It extends the reputation of the School and its Headmaster through means of inspiring and enabling the active participation of the School's global community in philanthropic and engagement activities which serve to confirm and strengthen the School's future.

Fundraising forms a vital part of the School's capacity to deliver its mission, influencing positively a number of the School's strategic objectives to 2030. Our ten-year global advancement strategy, Campaign 2020 – 2030, is an ambitious programme, with a focus of supporting Means Tested Bursaries, whilst also welcoming some new projects alongside each year. We are progressing with confidence toward the School's commitment to meet its strategic objective of increasing the number of Transformative Means Tested Bursary recipients to a target of 40 pupils annually by 2030, having achieved over half of this figure (23 pupils) by the School Financial Year 2021 – 2022.

The Development Office is demonstrably successful and effective in its administration, and its organisational structure and administrative inter-plaiting in the School is recognised as an evolving entity, so it's a great time to join the office.

#### Brief

This full time, permanent post provides a comprehensive and professional PA support function to the DoD on a 1/2/1 direct report basis. The post holder will be in a position of trust with closed access to the administration. It is therefore the single most important attribute of the individual appointed that they appreciate and discharge the duties of the position with complete discretion and confidentiality. The post demands a constant necessity to see, hear, speak, handle and have immediate access to sensitive information in all forms of communication, and maintaining a relationship with the DoD of absolute trust and professional conduct is essential to the Development Office's success. This success is contingent on a strategic, bespoke, relationship-based approach to fundraising which is cognisant of the longevity of the institution.

## Stakeholders

The post holder will provide cross-unitary impact and needs to establish and maintain strong positive working relations with all members of the team and the wider school community, communicating and engaging both effectively and appropriately with alumni, friends, supporters, pupils, parents, sponsors, colleagues and all internal and external relations, clients and customers at all levels, and pertinent to the role.

### Key tasks encompassed by the role include, but are not limited to:

#### Multi-Directional Correspondence Management

- Multi-mailbox management, systematic drafting, composition, proofing, dispatch, receipt, prioritisation, filing, storage, retrieval, and disposition of communications in printed, hand-written, electronic, facsimile and voice form.
- Corresponding on behalf of the DoD with closed access to communications and the capacity to take dictation and draft correspondence, latterly with only thematic guidance.
- Communications Calendar administration, planning and effecting the fulfilment of multi-stranded, multi-format mailshots.

#### Multi-Directional Information & Communication Technology (ICT) Management

- Provide a confident, polite, professional and comprehensive telephony gateway for the DoD.
- Screening, answering and, if appropriate connecting telephone calls.
- Testing equipment and as applicable reporting, following-up and managing faults.
- Maintaining and updating telephone / address directories.
- Taking and passing on messages.
- Liaising telephony / ICT requirements.
- Making / booking telephone calls for and on behalf of the DoD.
- Recording, collecting, sending and receipting voicemail.
- Working with relevant colleagues to ensure the efficient account management for cellular and fixed telephone devices.

#### Multi-Directional Diary / Calendar Management

- Management of the DoD's diary: 'The Book', including but not limited to organising and maintaining arrangements for: meetings, conferences, travel, appointments, events, tours and visits with an ongoing process of making and rescheduling appointments.
- Exercising good judgement: signposting appointment transitions to protect the running of The Book, preventing overrun, planning transit time as appropriate.
- Balancing competing commitments to maximise time effectiveness and impact of the DoD.
- Briefing the DoD with short, medium and long-term diary updates assisting planning and providing dynamic recommendations and options.
- Provide a cross-unitary oversight of diary and calendar administration.
- Calendar related tasks including, but not limited to the administration of: annual and other leave, sickness, events, campaign dates, planning and the Directorate's staff locations.
- Management of departmental annual leave and time off in lieu (TOIL) records: requests, receipting, approval / decline, recording and tracking.
- Management of departmental record of sickness / absenteeism, including the administration of receipting, tracking, and scheduling return to work interviews.
- Management of departmental record of continuing professional development / conference / training / appraisal activity.

#### Event Administration

- Composition and systematic updating, circulation and administration of comprehensive event briefs specific to each event.
- Manage and implement multiple and simultaneous *répondez s'il vous plaît* (RSVP) processes for events both at the school and at a variety of national and international locations.
- Linked requirements such as capturing and servicing dietary and enhanced access requirements, production of table plans, menus, place cards, display materials, corporate gifts, boutonnières, and like-favours.
- Research and liaise appropriate venues, logistical, catering and administrative requirements.
- Provide operational support in the delivery of selected events in a flexible and accommodating manner.

#### Human Resources

- Liaising with relevant colleagues, all administrative requirements, with closed access and working with business partners in Human Resources as required.

#### Workflow / Desk / Environment Oversight and Support

- Maintaining a constant oversight of the workflow of the DoD, 'Boxes', identifying pinch points, blockages and escalating / de-escalating prioritisation of workflow with the overarching business need of 'keeping their desk moving'.
- Maintaining the DoD's office environment in practical ways such as stock control, preparation, provision, servicing and replenishment of publications, printed materials and stationery.

#### Reception

- Meeting and greeting visitors at all levels of seniority; site to site 'point to point' liaison, office and event reception.

#### Hospitality

- Stock control, preparation, provision, servicing and replenishment of hospitality for the thoroughfare of meetings and daily requirements of a similar nature.

#### Travel

- Complete administrative management of travel, both site to site transport as well as itinerary based multiple and international travel arrangements, visas, accommodation, and, occasionally, travelling with the DoD to support the administration of meetings, take notes or dictation, or to provide general assistance including with presentations and delegations.
- Linked requirements such as preparing materials for travel arrangements including documents, tickets and reservations.
- Liaising advance riders and multi-directional shipments of stocks, equipment and materials as required.

#### Meetings

- Attending as required, meetings including some outside usual office hours, and supporting the administration of the meetings before, during and after with collation of papers, calls, agendas, and minutes.
- Providing confidential administrative support, including at Board and Executive administration meetings.
- Organisation and attendance: logistics, ICT, room bookings, catering, hospitality, reception.
- Briefing, ensuring the DoD is well prepared for meetings.
- The administration of contact reporting and onward actions following all pertinent meetings, integrating reports and following correspondence as appropriate into our Customer Relationship Management software.

#### Printed Matter Preparation

- Proof reading.
- Preparing briefing notes and packs for the DoD to be distributed as applicable.
- The final production and presentation of documents, tenders, briefing papers, reports and presentations.
- Stock control, preparation, provision, servicing and replenishment of the Directorate's publications.

#### Procurement

- Researching, recommending and procuring items as required.
- Administration: supporting, for example, tendering processes, supplier evaluation and selection for corporate gifts.
- Manage the stock levels and requirements of the Directorate's stationery, publications, equipment and hospitality needs.

#### Filing / Data Capture / Storage / Database

- Fluent administration of all operational requirements with adherence to Information Commissioners Office stipulations, such as the General Data Protection Legislation, and in a manner which is robust to scrutiny and regular professional auditing.
- Supporting the DoD and wider members of the team by contributing to the ongoing review of the management and usage of digital and print matter information repositories by proposing potential developments, changes and improvements to the DoD and Development Officer: Operations at regular team meetings.
- Active participation in ongoing training opportunities to gain appropriate skills, experience and accreditation across platforms.
- Devising and maintaining office systems apposite to the extent of the post's remit.

#### Finance / Budgets / Expenses

- Processing the DoD's expenses and corporate credit card statements with their associated receipts, invoices, journals and related matters in a consistent, timely and professional manner, liaising with colleagues in the Finance Office as required.
- Supporting, apposite to the extent of the post's remit, the administration of, for example, management accounts, accounts payable, internal journaling, budget preparation, projections, petty cash, authorised signatories, and credit control.
- Working in partnership with colleagues in the Finance Office as required.
- Supporting the DoD with the administrative requirements pertinent to the external auditing of accounts and processes.

## Reprographics

- Liaise reprographic, print and design needs both internally with the school's reprographics department and external reprographic agents as required.

## Junior Directorate Staffers / Interns / Ambassadors

- By delegation, undertaking the training and / or supervision of Junior Directorate Staffers / Interns / Ambassadors.

## Person Specification

### Qualifications

- It is anticipated that the successful candidate will hold qualifications at or in excess of Level 3 of The Regulated Qualifications Framework for England, Wales & Northern Ireland, or equivalent.
- It is acknowledged that this position may suit applicants with varying levels and types of qualifications including individuals seeking a new opportunity who may present significantly higher, or few or different formal qualifications but who demonstrate suitability for the role through their experience and aptitude.

### Skills

- It is anticipated that the successful candidate will have complete fluency in the use of ICT, with particular reference to the Microsoft Office suite of programmes.
- It would be beneficial, but is not conditional, that the successful candidate will have experience in management information systems pertinent to customer relationship management and fundraising. The Development Office presently uses *Blackbaud, Incorporated's* flagship product for its administration in this respect: the structured query language database software, *Raiser's Edge*.
- Recognising the frequent national and international travel requirements of the DoD, the ability to work independently with excellent self-discipline, motivation, time management and organisational skills is essential.
- A passion for detail, professionalism, authenticity and ethical working practices which engender pride and confidence in both the post holder and others.
- Demonstrating by example the Development Office's calibre with pride in personal appearance, deportment and practice.
- A team player who brings a robust willingness to succeed in all areas: making and maintaining excellent working relationships with all members of the Development Office, the School and all its wider stakeholders.

### Experience

- Individuals with experience in positions of this type will be aware of the breadth, pace, complexity and opportunity that such a role presents. It is acknowledged that this position may suit applicants with varying levels and types of experience including individuals seeking a new opportunity who may present little formal experience in certain aspects of the role. In these areas full and detailed training will be given in a supportive, collegiate environment.

## Terms

The standard working hours are 9am – 5pm, Monday - Friday, with 1 hour for lunch. These 35 weekly hours represent the regular expectation of the post holder. This is a full-time, in-office, in-person role which does not provide the opportunity for remote or hybrid working.

Occasionally (and only in exceptional circumstances without advance warning) there is a further expectation of a provision of enhanced flexibility of working, responsive to periods of peak demand or activity type, and very occasionally requiring the post holder to travel / stay away from the School. A position of balance, communication and mutual respect will recognise work over and above the standard hours of the post. Time off in lieu will be arranged at mutual convenience to reflect such additional professional commitments by the post holder.

The School's standard administrative staff leave entitlement is 28 days per annum, plus government stipulated 'bank' holidays for England. Leave is approved by the DoD. 'Bank' holidays are only transferrable at a ratio of 1:1 to an individual's leave entitlement if approved by the DoD and there is a business requirement to work during a 'bank' holiday leave period. The School's annual leave year is presently: 1 April – 31 March.

This post carries a probationary period of twelve months, with reviews by the DoD at the end of the first, third, and sixth months. The employee will be eligible to join the School's administrative staff pension scheme. This document is not exhaustive in describing the role, remit and responsibilities of the position. The post holder will be required to carry out such duties as are deemed appropriate within the context, purpose, title, seniority and remunerative scope of the role as determined by the DoD.

The DoD reserves the right to recruit, select and appoint this position in the most effective manner, with non-standard contractual variation(s) by mutual agreement – but all of which will be captured within the contract. Any appointment is wholly and conditionally subject to satisfactory completion of the full safer recruitment process administered by the School.