

# **Creswell Heritage Trust**

## **Job Description**

**Job title:** Finance & Bookings Assistant

**Department:** Finance & HR

**Pay grade / Salary:** £19000

**Hours:** 37.5 hours pw Monday - Friday

**Contract:** Standard permanent

**Reporting to:** Finance & HR Manager

**Responsible for:** N/A

### **Job description:**

The objective of this role is twofold, to assist with accounts functions and be responsible for bookings. The role will be to actively assist the Finance & HR Manager with day to day finance tasks to ensure a smooth running of the finance department, working within the developing Finance Strategy. This remit will include being responsible for using Sage accounts to process invoices and payments and responding to customer and supplier queries. This role will also be responsible for communicating with the visitors to Creswell Crags when making bookings primarily educational visits, but also tours, activities, events, and venue hire. Understanding the needs of the customer and growing the relationships with them to ensure a memorable visitor experience that starts with the booking is key to this role. We also anticipate the new digital offers & systems will be a key focus of Creswell Heritage Trust in 2021 onwards, and this role will be a key part of that. Historically, finance and administration at Creswell Heritage Trust has been under-resourced and under-developed. This new post will therefore offer the holder a chance to make a mark at a crucial time in the Trust's story.

**Key responsibilities:**

- Working with:
  - The Finance & HR Manager to provide timely information for the Trustees, Director & Senior Management.
  - The Finance & HR Manager to process the bookings to the point for invoice.
  - The Learning Officer regarding staffing Heritage Facilitator delivered bookings.
  - The Marketing & Events Officer regarding events.
  
- Responsible for:
  - Being the primary contact for schools to ensure all needs are met.
  - Advising the customer of the best activities to ensure a memorable visitor experience.
  - Responding to and processing all bookings including educational visits, tours including online Art Tickets, activities, events including Eventbrite and venue hire.
  - Checking and coding purchase invoices for submission into Sage accounts, ensuring purchasing procedures are adhered to.
  - Raising sales invoices for educational bookings and ensuring payments are received in a timely manner.
  - Preparing the weekly takings for banking, including reconciling the petty cash and liaising with commercial staff over queries.
  - Filing & storage of all accounts paperwork in preparation for the annual audit.
  - Ensuring all processes follow Creswell Heritage Trust financial procedures and financial strategy.
  - Responding to the info email account and Facebook messages, where appropriate or liaising with other staff to resolve any queries.
  
- Other:
  - Being prepared to undertake all training relevant to the role and taking a proactive approach to seeking out CPD opportunities.
  - Representing Creswell Heritage Trust with external stakeholders.

## **Person Specification**

<b>Experience</b>	<b>Essential</b>	<b>Desirable</b>
Minimum of 1 year in an accounts or book-keeping role	X	
Minimum of 1 year in a role involving taking bookings, scheduling appointments, or similar	X	
Experience corresponding with customers to ensure their needs are met	X	
Experience of takings bookings for a diverse range of services, requiring understanding of what is offered by each service		X
Experience of liaising with schools		X

<b>Education / Qualifications</b>	<b>Essential</b>	<b>Desirable</b>
5 GCSEs grade 5/C or above including English & Maths	X	
Degree or professional qualification/accreditation in a relevant discipline		X
Qualification/training related to customer services or administration		X
Willing to undertake regular training	X	

<b>Knowledge</b>	<b>Essential</b>	<b>Desirable</b>
Proficient in the use of MS Office, especially Outlook, Excel & Word	X	
General IT literacy, and ability to learn new IT skills	X	
Knowledge of Sage accounts or other accounting software	X	
Understanding of VAT, how it works and how to calculate it		X
Understanding of the management of online booking systems such as Eventbrite		X
Knowledge of video calling applications/software, such as Zoom and Teams, and experience using these in a professional context		X

<b>Personal Qualities</b>	<b>Essential</b>	<b>Desirable</b>
Organisational & time management skills	X	
Confident communicator & good inter-personal skills	X	
Attention to detail	X	
Problem-solving skills, and ability to multitask	X	
Ability to prioritise tasks	X	
Proactive attitude to improving own understanding of services offered	X	
Team player	X	
Excellent written communication skills	X	

Reviewed by: Nicola Tewson



Review date: 01/12/2020