

ROLE DESCRIPTION

ROLE TITLE: GIFT AID OFFICER

LAST UPDATED: January 2020

1. MAIN PURPOSE OF ROLE

- To claim repayment of income tax on subscriptions and donations.
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2. POSITION AND SUPPORT

Accountable to: The Treasurer

Accountable for:

- Claiming tax repayments on eligible subscriptions and donations.
- Holding Gift Aid Declarations (GADs) and maintaining current lists of them.

Liases with:

The Treasurer, Membership Secretary, Treasurer of the Youth Choir, Manager of the Youth Choir, or whoever may be maintaining HYC members' records; Friends' secretaries.

Works within a team of: as above

3. KEY RESPONSIBILITIES

- Appointment of a new Gift Aid Officer involves a procedure whereby the charity's 'responsible persons' confirm the appointment to HMRC. For various reasons this might take several weeks.
- Gift Aid claims may be made as often as the charity likes, but HCS claims have latterly been made once a year after the accounting year-end (31st August), with one claim for the main choir subscriptions and Friends' donations and another for HYC subscriptions. This will usually be followed by one or more supplementary claims where new GADs (with backdated effect) are received and to correct any errors and omissions.
- Access the Treasurer's online ledger and copy the receipts pages to a new spreadsheet.
- Sort by 'Cost Centre' (categories of receipt); delete receipts other than subscriptions and donations, resort by surname of payer, compare against list of GADs and delete payers without GADs, copy and paste payers' full names and addresses from list of GADs, rearrange columns to match format on HMRC's schedules.
- Download from the HMRC website its own spreadsheet with unique filename for the claim. Copy and paste contents of own spreadsheet onto HMRC spreadsheet. Complete online declaration, attach HMRC spreadsheet and submit online. The repayment will normally be made in about three days to HCS's bank.
- Although all this can theoretically be done in a couple of hours it always takes longer for many possible reasons such as missing information, technical problems with computers or websites, queries with Treasurer or HYC treasurer, or just making mistakes and having to do bits again. So a new gift aid officer should perhaps be prepared for two or three sessions of a couple of hours each for a first gift aid claim, reducing with practice.

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Additionally there might be an hour or two a month maintaining the list of GADs, and corresponding with others (see 'Liaises with' above).

4. QUALITIES & EXPERIENCE

- Familiarity with spreadsheets.
 - Familiarity with figures and with simple bookkeeping.
 - Sufficient computer experience to access HCS online accounts and records and communicate electronically with HMRC and with colleagues.
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5. APPOINTMENT AND TIMESCALES

- 3 years
 - One term's notice on termination
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6. LOCATION, TRAVEL & EXPENSES

- All HCS related expenses will be fully reimbursed
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7. BENEFITS

- n/a
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