

Post Details		Last Updated: 26 November 2025	
Faculty/Administrative/Service Department:	Advancement		
Job Title:	Advancement Assistant		
Job Family & Job Level	Professional Services	Level 2B	
Responsible to:	Director of Advancement		
Responsible for:	n/a		
<b><u>Job Purpose Statement</u></b>			
<p>This varied role provides administrative support to primarily support the Advancement Leadership Team (ALT) – comprising Director of Advancement and also the Associate Director, Philanthropy and Associate Director, Alumni and Supporter Engagement).</p> <p>Duties will include arranging and preparing senior staff travel (UK and overseas), submitting expense claims, completing travel card logs, diary management, arranging meetings and supporting with visits to campus from donors and prospects. The post will also assist with tasks relating to database updating, proposal and report generation, arranging team meetings and training.</p>			
<b><u>Key Responsibilities</u></b> This document is not designed to be a list of all tasks undertaken but an outline record of the main responsibilities (5 to 8 maximum)			
<ol style="list-style-type: none"><li>1. Arranging travel for the Director of Advancement and senior team in the UK and overseas, ensuring that all University policies are followed, including the processing of expenses and credit card claims. To include collating and producing travel itineraries and booking meetings, facilities, transport and make all necessary arrangements.</li><li>2. Update the CRM database with contact reports, and prospect event attendance following international trips and/or principal gift fundraising activities.</li><li>3. Support with the briefing, creation and formatting of proposals and reports to support principal gift fundraising.</li><li>4. Assisting the Leadership Team to organise internal and external meetings, including booking meeting rooms, organising catering and collating any meeting documents as required.</li><li>5. Providing administrative support in preparation for key events and visits including VIP visits, booking catering and liaising with internal and external suppliers.</li><li>6. Providing diary management support for ALT.</li><li>7. Provide support to ALT with transactions between the team and IT Services, Finance and deal with confidential enquiries to Human Resources.</li><li>8. Raising purchase orders as requested by ALT.</li></ol>			
<b>N.B. The above list is not exhaustive.</b>			

**All staff are expected to:**

- Positively support equality of opportunity and equity of treatment to colleagues and students in accordance with the University of Surrey Equal Opportunities Policy.
- Work to achieve the aims of our Environmental Policy and promote awareness to colleagues and students.
- Follow University/departmental policies and working practices in ensuring that no breaches of information security result from their actions.
- Ensure they are aware of and abide by all relevant University Regulations and Policies relevant to the role.
- Undertake such other duties within the scope of the post as may be requested by your Manager.
- Work supportively with colleagues, operating in a collegiate manner at all times.

**Help maintain a safe working environment by:**

- Attending training in Health and Safety requirements as necessary, both on appointment and as changes in duties and techniques demand.

Following local codes of safe working practices and the University of Surrey Health and Safety Policy.

**Elements of the Role**

This section outlines some of the key elements of the role, which allow this role to be evaluated within the University's structure. It provides an overview of what is expected from the post holder in the day-to-day operation of the role.

**Planning and Organising**

The post holder will be required to plan overseas travel arrangements for ALT ensuring they have all the relevant documents for their country of travel, all internal approvals have been obtained and any visa applications have been processed in a timely manner. The post holder will also be responsible for submitting expense claims following overseas trips for both cash and credit card expenses and raising purchase orders for the Advancement Team

The post holder will also arrange meetings for ALT. This will include finding and booking suitable meeting rooms, booking catering, making restaurant reservations, collating meeting documents and distributing as required by ALT.

As time allows, the post holder will be asked to help undertake event preparations, donor relations and special projects.

**Problem Solving and Decision Making**

The post holder will be required to manage their workload on a daily basis, negotiating with team members on deadlines so they can effectively manage their time, seeking support from their line manager where necessary.

To ensure consistency and quality of the support delivered across the department, the post holder will regularly review and add to the established processes and procedures to help the Advancement team work to provide high standards of service to our alumni audience. They are expected to exercise sound judgement and demonstrate initiative in terms of ensuring that the requirements of the department are implemented effectively and that they are maintained in accordance with standards set by University policy, procedures and legislation.

This post involves no direct line management or budgetary responsibilities. The post has an impact across all areas of Advancement due to their support for ALT.

**Continuous Improvement**

The University of Surrey currently holds a database of over 155,000 graduates including UK and overseas alumni, honorary graduates, friends of the University, retired staff. The post holder will act as a point of contact for any general enquiries from this international alumni base, recording these accurately on the Raiser's Edge database, and will need to keep updated on the priorities of the team to be able to answer enquiries efficiently.

**Accountability**

The post holder will be recording customer service enquiries, gifts and volunteering activity in our customer relationship management database (Raiser's Edge) and consistent accurate recording is essential, so the post holder should demonstrate a high level of accuracy and attention to detail.

### **Dimensions of the role**

There will be regular correspondence with a wide range of staff across the University and with some external contacts. The post holder will be required to communicate and work closely with academic departments e.g. in order to support mapping volunteering activities.

The post holder will plan their daily workload based on the priorities set by the line manager, providing the best possible service to their internal stakeholders.

### **Supplementary Information**

**Person Specification** This section describes the sum total of knowledge, experience & competence required by the post holder that is necessary for standard acceptable performance in carrying out this role.

Qualifications and Professional Memberships		Essential/ Desirable
HNC, A level, NVQ 3, HND level or equivalent with a number of years' relevant experience.  Or:  Broad vocational experience, acquired through a combination of job-related vocational training and considerable on-the-job experience, demonstrating development through involvement in a series of progressively more demanding relevant work/roles.		E
<b>Technical Competencies (Experience and Knowledge)</b> This section contains the level of competency required to carry out the role (please refer to the competency framework for clarification where needed and the Job Families Booklet).	<b>Essential/ Desirable</b>	<b>Level 1-3</b>
Appropriate experience of building good relationships with people	E	2
Appropriate experience of varied communication tailored to the appropriate audiences	E	2
Working knowledge of MS Office, Internet and Databases	E	3
Accuracy and attention to detail	E	3
Operational use and support of Raiser's Edge v7 or NXT (or similar) software	D	2
<b>Special Requirements:</b>	<b>Essential/ Desirable</b>	<b>Level 1-3</b>
Prepared to work outside regular office hours to assist at events	E	2
<b>Core Competencies</b> This section contains the level of competency required to carry out this role. (Please refer to the competency framework for clarification where needed). N/A (not applicable) should be placed, where the competency is not a requirement of the grade.		<b>Level 1-3</b>
Communication		2
Adaptability / Flexibility		2
Customer/Client service and support		3
Planning and Organising		3
Continuous Improvement		2
Problem Solving and Decision Making Skills		1
Managing and Developing Performance		n/a
Creative and Analytical Thinking		1
Influencing, Persuasion and Negotiation Skills		2
Strategic Thinking and Leadership		n/a
This Job Purpose reflects the core activities of the post. As the Department/Faculty and the post holder develop, there will inevitably be some changes to the duties for which the post is responsible. and possibly to the emphasis of the post		

itself. The University expects that the post holder will recognise this and will adopt a flexible approach to work. This could include undertaking relevant training where necessary.

Should significant changes to the Job Purpose become necessary, the post holder will be consulted and the changes reflected in a revised Job Purpose.

### **Organisational/Departmental Information & Key Relationships**

#### **Background Information**

The role of Advancement is to work with the academic community to engage alumni, friends, companies and trusts in the life of the University.

We are responsible for sustaining a lifelong relationship with our worldwide alumni community of over 155,000 graduates and raising funds to support students and the University's research and teaching activities.

Our aims

- To engage alumni, friends, companies and trusts and secure their financial support in order to advance the global ambitions of the University.
- To support alumni by facilitating networking and professional development opportunities and by providing a programme of benefits and services.
- To highlight and celebrate the achievement of our alumni and inspire the next generation of Surrey graduates.
- To support University projects, students and research and, in doing so, create lasting links between alumni and supporters and the University.
- Create awareness and visibility of the importance of philanthropy to the University and the value and impact the University has on society and the community around us internally and amongst our donor, alumni and student communities. Create and establish a culture of giving and asking on campus.

The post holder will work with ALT and a variety of team members to help the Office achieve the objectives above. They will provide support and services that will enable our Advancement Leadership Team to be more efficient and effective in building relationships and raising funds.

The post holder will report to the Director of Advancement.

#### **Department Structure Chart**

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graph TD; VP[Vice President Global] --> DA[Director of Advancement]; DA --> AA[Advancement Assistant];
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Vice President Global

Director of  
Advancement

Advancement Assistant

### **Relationships**

#### **Internal**

In order to help support ALT, the post holder will need to understand their internal stakeholders in order to be able to prioritise their diaries.

To support ALT , the post holder will need to develop good working relationships with:

- Finance for expenses, purchase card reconciliation and gift processing
- Faculty colleagues for obtaining volunteering information
- Web team for help with updating web pages
- Administrators in Global

#### **External**

In order to develop relationship and programmes and building and maintaining contacts that will lead to their support and greater engagement.

- Alumni
- Agencies and suppliers
- Consultants
- Other potential collaborators