

Trust Fund Officer

Role Description

Role Purpose

The Trust Fund Officer oversees Dorset NEU's administration of the District Trust Fund. The role ensures that applications for financial assistance are managed fairly, transparently and efficiently, and that members in hardship receive appropriate support in line with the district's Trust Fund rules and NEU values.

Key Responsibilities

1. Management of the Trust Fund

- Administer the Dorset NEU Trust Fund in line with district rules, procedures and financial guidelines.
- Ensure that all requests for financial assistance are treated fairly, confidentially and consistently.
- Maintain accurate records of applications, decisions, and payments.

2. Processing Applications

- Receive and review applications for support from Dorset NEU members experiencing hardship.
- Seek clarification or additional information where required, ensuring timely decisions.
- Liaise with the District Secretary or designated officers in cases that require consultation.

3. Financial Oversight & Reporting

- Maintain an up-to-date overview of Trust Fund income, expenditure and balances.
- Work with the Treasurer (if separate) or District Secretary to ensure the fund remains sustainable.
- Provide regular Trust Fund reports at Dorset NEU meetings, summarising anonymised trends, expenditure and any emerging concerns.

4. Promotion & Accessibility

- Ensure members and reps are aware of the existence and purpose of the Trust Fund.
- Share information about eligibility, how to apply, and what support the fund can provide.
- Promote clear, accessible guidance and application processes.

5. Confidentiality & Member Support

- Uphold strict confidentiality in all Trust Fund matters.
- Treat all applicants with dignity, sensitivity and respect.
- Signpost members to additional union or external support services where appropriate.

6. Collaboration

- Work closely with the District Secretary, Treasurer, Membership Secretary and other relevant Dorset NEU officers.
- Liaise with the Regional Office if guidance is required on unusual or complex cases.
- Ensure Trust Fund practices reflect NEU values of solidarity, fairness and collective care.

Skills & Attributes

- Strong organisational and administrative skills.
- Ability to handle sensitive information with absolute confidentiality.
- Fair, compassionate and non-judgemental approach.
- Good financial awareness (training/induction can be provided).
- Commitment to NEU values of solidarity, dignity and member wellbeing.

Time Commitment

- Attendance at Dorset NEU meetings.
- Ongoing availability to review applications and administer the fund.
- Occasional liaison with the Treasurer, District Secretary or Regional Office as required.