

Appointment of **GRANTS MANAGER**

January 2012

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LETTER FROM THE DIRECTOR

5 January 2012

Thank you very much for your interest in this post. This information pack should give you a clear understanding of the role, and of the kind of person we are seeking.

We are an independent, endowed, charitable foundation making grants to both individuals and organisations (including schools). The oldest of our four constituent charities date from the seventeenth century. Our 'area of benefit' is Lambeth. We are concerned with the relief of poverty, and are driven by a desire to address that in ways which break cycles of deprivation and which bring about permanent improvement in the lives of those we assist.

This post is for someone who is able to combine well-developed operational and management skills with imaginative, exploratory, strategic thinking. We are seeking someone who is strong in a range of practical, core administrative and management skills *and* in generating new, fresh approaches.

If you have questions not answered here, or wish to discuss the role further, please contact me, c/o Gill Broaders, on 020 7735 1925.

Hugh Valentine
Director

THE ROLE

This post leads on the Foundation's grant making activity. It has grown in recent years, as have the sums available for making awards. In 2010/11 grants totalled **£2,061,338**. The role involves the effective management of grants budgets, staff and processes *and* the ability to understand changing patterns of need within the area we serve and to help the Foundation respond to these.

CONTEXT

Offices and staff

The post is based at our offices in North Lambeth, not far from Waterloo and very close to the Imperial War Museum. We have a staff team of seven, some of whom are part time (6.4 staff, full time equivalent).

Director	Hugh Valentine
Finance Manager	Lesley French (4 days)
Estate Administrator	Gill Broaders
Grants Manager	<i>This post</i>
Grants Officer	Teresa Priest
Grants Officer*	Mandeep Bajwa
Grants Administrator	Tonia Symons (3 days)

**Not formally part of the permanent establishment; two year contract from June 2011*

Structure and Governance

The Foundation comprises four charities, under the working name of The Walcot Foundation. More details can be found elsewhere, referenced below. The trustee body is the Walcot & Hayle's Trustee (a non-profit making company) and is currently made up of 12 trustees, known as Governors. As with all charities, the trustees act as a body in the best interests of the charity and carry ultimate responsibility for the work and the resources they hold 'in trust'. Governors set policies and strategic direction and make decisions on grant recommendations.

The present structure is a trustee Board which is served by three working committees: Investment, Grants and Finance & General Purposes. The Grants Manager takes responsibility for supporting, servicing and minuting the work of the Grants Committee.

Funding

Three of our four constituent charities are permanently endowed, and the income produced by these assets fund the charitable activity of the Foundation. At present the Foundation does not fundraise. Some of the Foundation's assets are in the form of local property - the Walcot Estate - roughly 60 houses, flats and other property. Some of our staff spend time managing these, and all staff are expected to play a part in taking calls and dealing with enquiries, where these fall outside their direct role.

Our aspirations

Poverty in Lambeth in 2012 looks different from poverty in Lambeth in 1667 when Edmund Walcot made his Will. The Governors seek ways of making long-lasting and sustainable improvements for those they assist. **'A hand-up, not a hand-out'** summarises this approach, as does our wish to **'tackle poverty by creating opportunity'**. And we aim to do this in ways which **focus on what**

our grants are likely to achieve (impact), **are fair** (we apply the same eligibility threshold in every case) and which are likely to lead to **employability and employment**. We have developed ‘**added value**’ grant making to support these aims by offering advice and support beyond the grant itself.

JOB DESCRIPTION

Job Title	Grants Manager	
Reporting to	Director (who is also Clerk to the Governors and Company Secretary)	
Location	The Foundation's offices: 127 Kennington Road London SE11 6SF	
Hours	35 hours a week, Monday to Friday, with some out of hours work	
Purpose of role	To professionally and effectively manage the Foundation's grant making functions. This will include - <ul style="list-style-type: none"> a) ensuring these remain faithful to our charitable objects b) doing so in ways that take account of contemporary context and need c) doing so in ways consistent with our Equal Opportunities policy and statement of approach and other policies set by the Governors 	
Duties, responsibilities (this is what the role encompasses)	Overarching	To strategically and operationally manage the grant making function of the Foundation. This means regularly reviewing activity and policies in the light of external and internal changes and developments and, on the basis of this, thinking and planning ahead; and managing the daily work of the grants team.
	Relationships	To build and maintain productive relationships with colleagues, Governors and a wide range of stakeholders. The latter will include grantees, third sector and statutory bodies. To share fully in the work of the staff team in administering the Foundation effectively and in maintaining and promoting the Foundation's image and reputation.
	Strategic	To contribute to the Foundation's forward and business planning, and to new initiatives. To take special responsibility for this in the area of grant making. With the Director, to assist Governors in establishing priorities for grant making; to undertake research and the preparation of policy proposals and discussion papers for the Governors. To monitor legislation, social and political trends, and other matters, as they relate to income-poverty, social need, education, employability.

	Operational	<p>Manage all aspects of grant making and grants staff.</p> <p>To be responsible for the effective assessment and processing of grant applications, to include all associated activities which may occur both pre and post-award, such as:</p> <ul style="list-style-type: none"> a) promoting grant opportunities in accordance with the Foundation's Communications Strategy; b) providing advice and guidance to applicants and prospective applicants; c) scrutinising and assessing applications; d) visiting projects and organisations as needed; e) liaising and negotiating with applicants on any aspects of their applications; f) ensuring that recommendations to Governors are in line with current grant making policies and are of a high quality; g) preparing grant agreements; h) overseeing referrals to the 'added value' grant making partners.
		<p>Maintain and develop systems which allow the Foundation to assess the impact and effectiveness of grants, and to learn from what does and does not work. To produce reports on impact and effectiveness.</p>
	Records, IT	<p>Maintain full records and audit trails (manual and electronic).</p> <p>Maintain accurate financial records showing grants made, due, committed and conditional; to reconcile grant payments with the Finance Manager; to provide grant payments and other information as needed to assist in the preparation of the Annual Report and Accounts and any other reports and publications.</p> <p>To be responsible for the right use and maintenance of ICT (Information Communication Technology) equipment and programmes used for grant-making activities and to operate within data protection provisions; and to ensure the grant making content of the website is up to date.</p>
	Staff management	<p>Line management responsibility for grant making staff and any other staff as may be assigned (overseeing their work, managing their performance, conducting staff appraisals and planning staff development). To assist with the recruitment and training of staff as required. Recruiting and managing volunteers as needed.</p>
	Other	<p>To assist the Director in all areas of the Foundation's operation and to carry out such tasks as deemed necessary for the effective and efficient functioning of the Foundation and the Walcot Estate, as may be commensurate with the grade and role.</p>

		<p>To comply with all current employment, charity, data protection, equalities and other law and regulations as they apply to our work.</p> <p>To represent the Director as required.</p>
Salary, benefits	<p>Salary is within the NJC range SCP40-50, currently £36,960 - £45,807 28 days paid holiday a year Employer's contribution to pension plan after 12 months in post Life assurance Interest-free travel ticket loan</p> <p>The Foundation's pay scales are linked to an external, national, scale which is used by many charity and voluntary bodies. Where the external scale negotiates and implements cost of living increase, these are implemented locally. Within the scale for the post, the holder is eligible for progression by one point along the range (until they reach the top) on the anniversary of their appointment and subject to a positive appraisal. Starting point within the range will be negotiated with the chosen candidate.</p>	
Contract type	Permanent, subject to probationary period of six months	

PERSON SPECIFICATION

GRANTS MANAGER		ESSENTIAL	DESIRABLE	HOW ASSESSED
This is a crucial role within our team. This Person Specification profiles the ideal range of skills, knowledge and aptitude we are looking for in the successful applicant.				
A	QUALIFICATIONS & EXPERIENCE			
A.1	A high level of intellectual and analytical ability. <i>This may be evidenced by a degree, professional qualification, or by working successfully at a level comparable to this post</i>	<input checked="" type="checkbox"/>		Application, interview, test, presentation
A.2	A minimum of four years' experience of successfully managing a role involving multiple projects, tasks and staff	<input checked="" type="checkbox"/>		Application, references
A.3	Experience of grant making		<input checked="" type="checkbox"/>	Application, interview,
A.4	Experience of working with people affected by social exclusion and of ways of helping them remedy this		<input checked="" type="checkbox"/>	Application, interview,
B	KNOWLEDGE			
B.1	Knowledge of the broad aims of current educational policy and social policy as they relate to the objects of the Foundation		<input checked="" type="checkbox"/>	Application, interview,
B.2	Knowledge of the ways in which poverty and disadvantage impact individual lives and communities	<input checked="" type="checkbox"/>		Application, interview,
B.3	Knowledge of the principles of effective grant-making		<input checked="" type="checkbox"/>	Application, interview, presentation
B.4	Ability to interpret qualitative and quantitative data	<input checked="" type="checkbox"/>		Application, interview,
B.5	Familiarity (understanding) of Lambeth <i>or similar</i> inner-city urban area		<input checked="" type="checkbox"/>	Application, interview,
B.6	Broad knowledge of current welfare rights provision and state benefits, or ability to acquire this		<input checked="" type="checkbox"/>	Application, interviews
C	SKILLS AND ABILITIES			
C.1	Excellent oral and written communication skills	<input checked="" type="checkbox"/>		Application, interview, test presentation
C.2	Able to work with committee structures and processes	<input checked="" type="checkbox"/>		Application, interview
C.3	Proficiency in word-processing, spreadsheets and database applications (MS Office Professional)	<input checked="" type="checkbox"/>		Application and test
C.4	Administrative skills that demonstrate the ability to organise and manage workload to deadlines.	<input checked="" type="checkbox"/>		Application, interview,
C.5	Self motivated and able to work without close supervision	<input checked="" type="checkbox"/>		Application, interview,
C.6	A working familiarity with budgets and an ability to read and interpret a basic set of accounts	<input checked="" type="checkbox"/>		Application, interview,

C.8	An ability to make objective assessments based on available data	<input checked="" type="checkbox"/>		Application, interview,
D	WORK RELATED REQUIREMENTS			
D.1	An organised and methodical approach to work, combining numerical accuracy with good attention to detail and an ability to meet deadlines	<input checked="" type="checkbox"/>		Application, interview and test
D.2	An understanding of the issues raised in a multi-racial setting such as Lambeth, and an understanding of issues of diversity and equality of opportunity	<input checked="" type="checkbox"/>		Application, interview
E	PERSONAL QUALITIES/ATTITUDES			
E.1	Able to deal in a helpful, friendly and professional way with people from all social and professional backgrounds	<input checked="" type="checkbox"/>		Application, interview, test
E.2	An energetic, 'can do' approach to work	<input checked="" type="checkbox"/>		Application, interview,
E.3	The ability to work independently and as part of a team	<input checked="" type="checkbox"/>		Application, interview,

RECRUITMENT TIMETABLE

See below, please refer also to the timetable at www.walcotfoundation.org.uk/gm as this will always be the most up-to-date listing and may reflect changes made after this document was prepared.

Post advertised from	Friday 6 January 2012
Closing date	Wednesday 25 January 2012
Long-listing	26-27 January
Preliminary interviews	2,3 and 4 February
Short-listing	6 February
Testing	Individually arranged
Presentation and interview	13, 14, 15 February

OTHER INFORMATION

As part of their research, applicants should refer to the *Annual Report and Accounts 2010/11*, our website, and to a summary publication published in December 2011. Links to all these may be found at www.walcotfoundation.org.uk/gm

HOW TO APPLY

To apply for this post please download and complete the application form which can be found on our website at www.walcotfoundation.org.uk/gm along with other details about the process.