

# Recruitment of **GRANTS OFFICER**

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10 May 2018

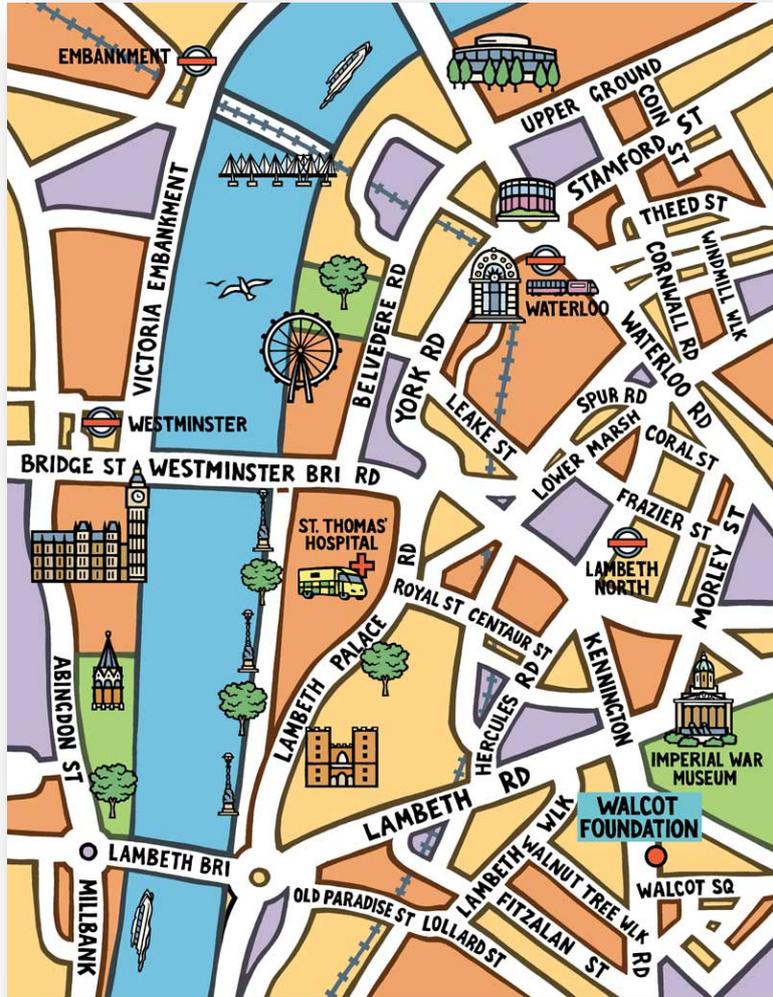
We are an independent grant-making foundation and charity with roots from the early 17th century. Our work is to break cycles of financial deprivation for people living in Lambeth. We offer *a hand up, not a hand out*, and seek to *tackle poverty by creating opportunity*

Over the ten years to March 2017 we made grants amounting to almost £19 million. The Foundation's assets are currently valued at circa £100 million.

We are seeking a new colleague with the right professional and personal skills to join us in this key role.

[walcotfoundation.org.uk](http://walcotfoundation.org.uk)

We are located close to the Imperial War Museum and within easy reach of stations at Lambeth North, Elephant & Castle and Waterloo



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## THE PERSON WE SEEK - SUMMARY

We are looking for someone to join us as Grants Officer who –

- has a **real interest and commitment** to the purpose of the Foundation
- has an **understanding of the impact of poverty** on young people and young adults
- is able to **bring life to grantmaking** for purposeful outcomes
- is able to **develop additional support** that the Foundation can offer to individuals
- is able to **effectively analyse, synthesise and summarise data** from a variety of sources
- has **good communication skills** (writing, speaking, listening)
- has the temperament to work well as **part of a team**

## ABOUT THE JOB

### Terms

The post is permanent and full time (35 hours a week, Monday-Friday 0900-1700) and is based at our offices at 127 Kennington Road London SE11 6SF. We are very close to the Imperial War Museum and a short walk from Lambeth North Underground Station (Bakerloo Line). Elephant & Castle and Waterloo stations are within easy walking distance. We are well served by bus routes.

Salary is on a scale currently £29,424-£36,912 (Spinal Column points SCP29-SCP38). The salary starting point is dependent on experience. Annual progression along the scale is subject to appraisal. The Foundation contributes 10% of salary to an employee pension.

Annual leave entitlement is 28 days paid leave per year (plus public holidays).

The appointee will serve a six month probationary period. The post reports to the Grants Manager.

### Purpose of the Role

The Foundation makes grants to organisations, schools and individuals. We have an annual grants budget of c£2m. The majority of our grants to individuals support low income Lambeth residents of any age in further or higher education. We also run a small rehousing grant programme made solely through referral organisations.

This post will **have a particular focus** on: assessing and administering grant applications from individuals; monitoring and evaluating grants made to individuals; and promoting the availability of grants to individuals. The **role requires**: contact with applicants (primarily via email and telephone); the ability to present clear written assessment reports, recommendations and decisions; and **the ability** to think critically in order to ensure that the Foundation's grants make a long-term, sustainable difference to individuals' lives in accordance with the Foundation's Schemes, aims and objectives. **The work requires** attention to detail and effective time management.

The post holder will also undertake assessments in relation to grants to organisations, and other grant-making duties and function, as required by the Grants Manager. The split between handling grants to individuals and those to organisations is roughly 75:25 but duties may change in the light of the needs of the Foundation and the needs of organisational effectiveness.

The post holder will also be responsible for developing and implementing changes to the non-financial support we offer to individuals, not least in light of research we commissioned in our 350th anniversary year (a link may be found at [walcotfoundation.org.uk/jobs](http://walcotfoundation.org.uk/jobs)).

## Job Description (Key Duties)

### General role

- 1 To carry out assessments of grant applications and assist with all related administration and monitoring for grants to individuals.
- 2 To assist with publicising grant opportunities for individuals (including sending regular e-newsletters via Mail Chimp).
- 3 To share in the work of the small staff team in administering the Foundation effectively and cheerfully and in maintaining and promoting the Foundation's positive image and reputation.
- 4 To undertake such additional duties as may be reasonably assigned.

### Grant-making, monitoring and evaluation

- 5 To assess and process grant applications from individuals (circa 75%) and organisations (circa 25%), to include all associated activities which may occur both pre and post-award (or refusal), such as:
  - providing advice and guidance to applicants and prospective applicants, primarily via telephone and email;
  - scrutinising and assessing applications;
  - liaising and negotiating with applicants on any aspects of their applications;
  - reaching a judgement and recommendation on each case, in line with current grant-making policies;
  - preparing and presenting written case reports with detailed analysis and recommendations;
  - referring individuals to Walcot Careers Advice or Benefits Advice projects as required.
  - working closely with the Grants Administrator to ensure all grants records are maintained and correspondence sent out in a timely manner.
- 6 To ensure grant recipients comply with monitoring and evaluation requirements.
- 7 To analyse monitoring and evaluation results and make recommendations for future grant-making based on these.

### Project Development/Management

- 8 To research, develop and manage additional non-financial support that may be offered to individual grantees.
- 9 To develop and maintain successful relationships with relevant support organisations and referral agencies (e.g. schools, colleges).

### Associated Administration

- 10 To maintain full records and audit trails (manual and electronic).
- 11 To assist in the maintenance of accurate financial records; 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 accounts and any other financial reports.
- 12 To process applications and prepare written reports for presentation to meetings of the Governors and to attend meetings as required.

#### **Other**

- 13 To provide input as required to strategic planning and to new initiatives.
- 14 To monitor and be familiar with relevant legislation and with national and local government funding initiatives as they relate to poverty, social exclusion and education.
- 15 To maintain familiarity with the area of benefit (Lambeth) and its communities.
- 16 To keep in touch with the developments, trends and issues affecting the voluntary sector, especially those of direct relevance to the Foundation's work.
- 17 To assist colleagues and Governors 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.
- 18 To comply with all current employment, charity, data protection, equalities and other law and regulations.

## Person Specification (What We Are Looking For)

<b>Education/ Professional Qualifications</b>	<p>1 A high level of intellectual and analytical ability is required. This may be evidenced by a degree, professional qualification, or by working at a level of complexity comparable to this post.</p>
<b>Knowledge &amp; competence</b>	<p><b>ESSENTIAL</b></p> <p>2 Knowledge of issues facing young people (18-30) from low income backgrounds in an inner-city context</p> <p>3 An understanding of poverty and education as a route out of poverty and the ability to think inventively about how these might be tackled through effective grant-making</p> <p>4 Knowledge of monitoring/evaluation systems</p> <p>5 Excellent oral and written communication skills</p> <p>6 Ability to interpret quantitative and qualitative data</p> <p>7 High level of IT competence (Word, Excel and database experience)</p> <p><b>DESIRABLE</b></p> <p>8 Knowledge of the Salesforce platform</p> <p>9 Knowledge of Lambeth or comparable inner London boroughs</p> <p>10 A working familiarity with budgets and an ability to read and interpret a basic set of accounts or the ability to develop this</p> <p>11 Broad knowledge of current welfare rights provision and state benefits</p>
<b>Experience</b>	<p><b>ESSENTIAL</b></p> <p>12 Experience of having worked successfully as part of a team</p> <p>13 Experience of writing proposals, reports and evaluations</p> <p>14 Project development and management</p> <p><b>DESIRABLE</b></p> <p>15 Experience of working directly with individuals in some organisational context</p> <p>16 Working with young people (18-30) whose lives are affected by poverty and other forms of social disadvantage.</p> <p>17 Developing partnerships with other organisations</p> <p>18 Producing e-newsletters (e.g. MailChimp)</p>
<b>Personal qualities</b>	<p>19 A high level of intellectual and analytical ability</p> <p>20 Friendly, able to work within a small team and to relate appropriately – in the role – to a wide variety of people</p> <p>21 Demonstrates initiative, resourcefulness and self-motivation</p> <p>22 Administrative skills that demonstrate the ability to organise and manage workload to deadlines</p> <p>23 Committed to the objects and ethos of the Foundation</p> <p>24 An understanding of the issues raised in a multi-cultural setting and an understanding of and a commitment to issues of diversity and equality.</p>

## WORKING FOR THE FOUNDATION

We're a small team, committed to the Foundation's work and its approach. Staff turnover is low, reflecting job satisfaction and a positive working environment. Relationships within the staff team and with Governors are good. We don't take these for granted and work at maintaining and nurturing them. There is an understanding of the different roles we play and in particular of the role of the Governors as charity trustees charged with ultimate responsibility for the stewardship of the Foundation, its assets and its purpose.

Because we are a small team no post can be exclusively restricted to one area of work. All staff are expected to contribute to the team and to work flexibly as required by the Director. Each member is expected to support colleagues and to work co-operatively and to take an interest in all aspects of the Foundation's activity. Each member of the team is expected to make corporate contributions, commensurate with their post, to strategy and development for the furtherance of the Foundation's aims.

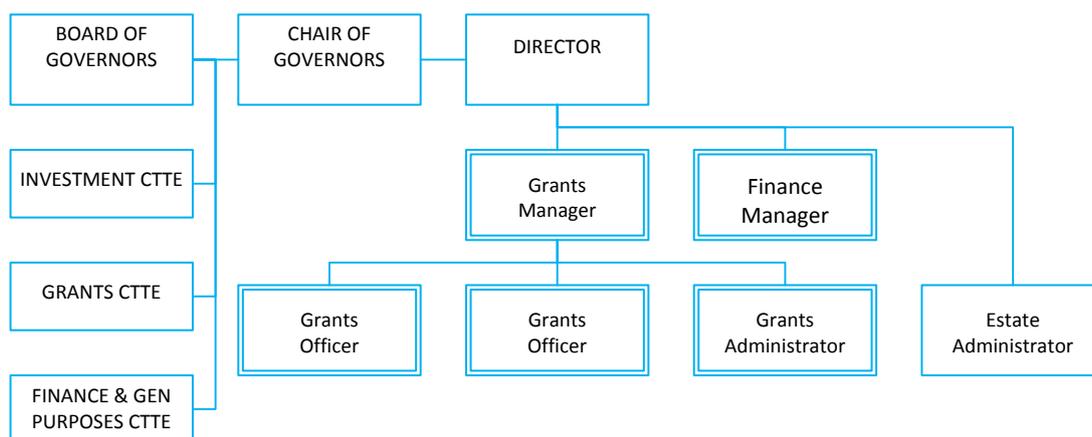
All post holders are representatives of the Foundation and so must conduct themselves in such a way as to maintain and enhance its purpose and mission. Some information retained by the Foundation is of a confidential nature and staff members are required to treat this with care and discretion.

Our principal function is to realise the Governors' wishes for how we are to fulfil our 17th century charitable purpose (the relief of poverty in Lambeth) in the light of 21st century realities of social and financial exclusion. To find out more, please look around our website.

The Foundation comprises four charities, two of which bear the name of our principal benefactor Edmund Walcot. Other charities have been subsumed over the years. We can trace our earliest roots to 1618. Our 'area of benefit' is coterminous with Lambeth, an inner London local authority area.

We are very fortunate in being an endowed charity where our assets generate our income. We manage these carefully and control our costs in order to maximise the sums we have for grant-making. *Our aim is to have a real impact on the lives of those we assist by improving their long-term employment prospects.* An important aspect is our view of grantees as partners and not as recipients of charity. Many of those we help have reason to feel forgotten by society. Our aim is to build on the strengths they have and to restore their self-confidence.

## Structure



## OTHER INFORMATION

### Access

Our offices are situated in adjoining basements of two 18th century townhouses. Access is by steps, and once within the offices there are several changes in floor level. There is no wheelchair access.

### Evening duties

The Grants Officer is required to attend meetings of the Grants Committee (about 6 meetings a year). These take place in the Governors' Boardroom from 6.30pm. There may be occasional other evening meetings.

## RECRUITMENT PROCESS

Please only make an application if you meet our **Person Specification** details contained in this pack.

Send your CV **AND** a covering letter of no more than two pages of type. **The letter must set out** why you are interested, *and how you meet the Person Specification*. What you write, and how you write it, will form part of the basis for our long listing.

*Optionally* please also complete our Equalities Monitoring Form (to be found in the download section of [www.walcotfoundation.org.uk/jobs](http://www.walcotfoundation.org.uk/jobs)). This is used solely for statistical and monitoring purposes). Send your CV and letter (and the optional Equalities monitoring Form if you chose to) in a single email to [office@walcotfoundation.org.uk](mailto:office@walcotfoundation.org.uk)

We will acknowledge receipt by email.

**Closing date:** 5pm Friday 1 June

Interview dates: These are likely to take place on 11/12 June

*If you have questions that are not answered by this material or our website please contact Daniel Chapman, Grants Manager, on 020 7735 1925*

Thank you for your interest in this post and our work. Find out more about the Foundation, its history and scope at [walcotfoundation.org.uk](http://walcotfoundation.org.uk)