

# THE SCHRODER FOUNDATION

## GRANTS OFFICER RECRUITMENT PACK

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For an informal discussion contact  
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# THE SCHRODER FOUNDATION

## Who We Are

Formed in 2004, The Schroder Foundation is an independent grant-making charity (*Reg No. 1107479*). It currently has a board of seven Trustees. It donates up to £2m per year to a wide range of charitable causes.

The Schroder Foundation is wholly independent of Schroders Plc, the investment management company.

The Foundation's Charities Office also provides administrative services to four other charities, which are:

- Schroder Charity Trust
- German Christ Church London Charity
- Charities Administered by the Kaiser Wilhelm II Fund
- The Mallinckrodt Foundation

## What We Do

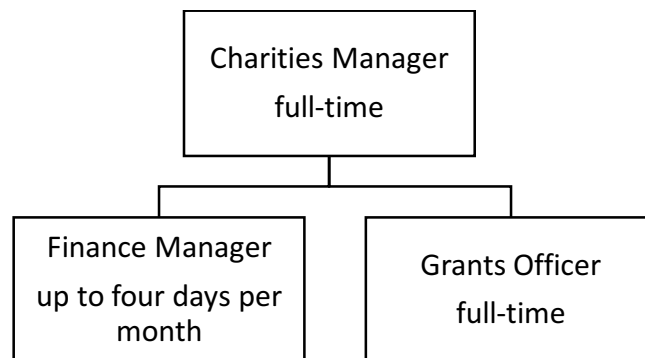
The Schroder Foundation has a strong focus on due diligence and building relationships with the charities that it supports, broadly within the following areas of giving:

- Education & Young People
- Environment & Conservation
- Health & Medicine
- Social Welfare & Community
- Arts & Culture
- Support for the Armed Forces
- International Development
- Heritage

Relying on the proactive initiative of its Trustees with the help of the Charities Manager, potential recipients are identified. The Schroder Foundation does not currently accept speculative appeals or provide support towards individuals.

The Foundation also operates a sub-committee for its charitable giving on the Isle of Islay on the west coast of Scotland, where the family have had a home for more than 80 years.

## The Schroder Foundation Organisation Structure



### The Context for the Role

The Schroder Foundation is increasing its staffing capacity, to better meet the day-to-day requirements and strategic developments of the Foundation and the charities it provides services to. The new Grants Officer will be integral to the smooth running of the Charities Office. They will work alongside the Charities Manager to strengthen the administration and grant-making systems, processes and policies in order to ensure maximum efficiency and effectiveness. So, the post-holder will need to be competent and comfortable with change, administration and making things work better. They will also need to be confident about sharing their ideas about how to improve the way in which the charities are administered.

The Grants Officer will manage a demanding workload, which includes being the first point of contact for enquiries into the Charities Office, liaising with Trustees, involvement in meeting preparations and attending the charities' meetings as minute-taker, handling grants administration, supporting the Charities Manager with grants management, and maintaining records of grant giving. They will also have responsibility for the application and grant-making process of the Schroder Charity Trust and its website, [www.schrodercharitytrust.org](http://www.schrodercharitytrust.org) including assessing applications, liaising with Trustees on shortlisting, adapting and refining the grant-making process, and managing the website.

In addition, they will support the Trustees and Charities Manager in contributing to the ongoing development and strategy of The Schroder Foundation – alongside the other charities to which they will provide services – to ensure it continues to grow as a well-run and well-respected Foundation within the UK grant-making sector.

### More about you

The Grants Officer will be self-motivated and well organised. You will need to demonstrate excellent communication skills and an aptitude for a range of administrative tasks. You will also have good analytical and numerical skills, to support the range of grant-making across the charities.

The team is very small and so the Grants Officer will need to be flexible. There are times when it is very busy – especially around the meetings cycle – so you will need to be able to work under pressure and be able to juggle what can sometimes be a demanding workload.

The Grants Officer will also need to be good at using their own initiative and at finding solutions.

This post would suit a wide range of candidates. You might be looking for a development opportunity, or you might be attracted to working with a small team, or you might just be interested in this particular role, or organisation. Whatever your motivations, we would like to hear from you, particularly if you enjoy a variety of tasks and challenges, have strong organisational skills, are a team player and a problem solver.

## THE SCHRODER FOUNDATION

<b>Job Title:</b>	Grants Officer
<b>Location:</b>	Rivington Street, London EC2A 3AY
<b>Post:</b>	Full time (35 hours per week, Mon-Fri)
<b>Duration:</b>	Permanent
<b>Reporting to:</b>	Charities Manager
<b>Salary:</b>	£28,000 to £33,000 per annum
<b>Benefits:</b>	10% non-contributory pension, 25 days annual leave

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### Purpose of the Role:

The Grants Officer will provide support to the Charities Manager and Trustees to underpin the smooth running of the following charities:

- The Schroder Foundation
- The Schroder Charity Trust
- The Charities Administered by the Kaiser Wilhelm II Fund
- The Mallinckrodt Foundation
- The German Christ Church London Charity

### Key Responsibilities:

#### General Grant-Making Support

- Deal with all general enquiries, including logging initial enquiries and applications received for the Charities, and provide direction and guidance where appropriate.
- Provide routine grants management support to the Charities Manager, including managing reporting timescales and reminders, processing grant agreements etc.
- Support the Charities Manager in preparing documentation such as drafting grant offer letters, report cover notes and summary proposal forms.
- Provide meeting support to the Charities Manager for external meetings as required, by organising meetings, taking notes and minutes, capturing actions, etc.
- Maintain records of grant-giving for the five charities.
- Review of the systems for recording and managing grant making. This includes an opportunity to review the current systems and the potential implementation of a new grants management system.

## The Schroder Charity Trust – Grant Making Programme

The post holder will have day-to-day responsibility for the Schroder Charity Trust's grant-making programme. The Schroder Charity Trust has been operating for over 70 years. It is a generalist grant-making charity considering applications from a range of charities via an online process. It makes grants of up to £5,000 per charity. Each year, it receives approximately 700 applications and approves around 120 grants.

Key Responsibilities include:

- Assessing and managing applications for funding to the Schroder Charity Trust, including analysing information against agreed criteria and interpreting financial accounts and data.
- Providing the Trust Directors with clear assessment reports for each application to support decision making.
- Liaising with the Charities Manager and the Trust Directors on the application shortlisting and grant-making processes, adapting and refining these as required.
- Informing applicants of the outcome of their application and work with the Finance Manager and Charities Manager to arrange payment of donations.
- Grants Management – manage and monitor the caseload of grants awarded, advising Trustees of any key developments.
- To be the first point of contact for applicants and potential applicants regarding the process and any issues experienced with the web-based application process.
- Responsibility for the day-to-day management of the Schroder Charity Trust website, ensuring it is functioning and liaising with the website company to make changes and address issues.

## General Support to the Charities/Charities Office

- Process and manage incoming and outgoing mail.
- Take responsibility for all incoming telephone and email enquiries.
- Maintain accurate and up-to-date paper and electronic filing systems, providing support around file storage and management in compliance with the Data Protection Act and GDPR.
- Process and manage invites and attendance for events, liaising with the Charities Manager and the Trustees regarding their attendance.
- Manage the annual meeting arrangements for the five charities including liaising with Trustees to confirm the schedule of meeting dates, booking the venue and liaising with the venue regarding catering and attendees.
- Scan, collate and distribute the papers for the various charities meetings.
- Assist in the production and presentation of papers for the various charities' meetings.
- Attend the charities' meetings to take notes, record minutes and actions (approximately 11 meetings per year).

- Provide support to the Trustees of the charities as required, which includes providing them with information and support as well as helping to resolve issues.
- Represent the Trustees of the five charities (and the wider Schroder family) at various events & meetings associated with charities and organisations.
- Network with peers, particularly within the grant making sector, in order to keep up to date with developments in the sector and learn from others with the aim of supporting the best possible practice for the charities.
- Work closely with the Charities Manager to ensure the overall smooth running of the charities and to input into the ongoing development of processes, procedures, policy and strategy.
- When asked, deputise for the Charities Manager.

## PERSON SPECIFICATION

E = Essential, D= Desirable

<b>Experience and Skills</b>	<b>E</b>	<b>D</b>
Experience of working in or with the charitable sector.	✓	
Understanding of some legislation relevant to charities and voluntary organisations.	✓	
Knowledge or understanding of grant-making processes and procedures.	✓	
Strong organisational skills with ability to multi-task, prioritise and deal with interruptions.	✓	
Good analytical skills, with the ability to gather, interpret and assess information from a variety of sources, assess risk and identify key issues.	✓	
Good numerical skills, with an ability to analyse and interpret financial information.	✓	
Excellent verbal and written communication skills.	✓	
<b>Abilities and Aptitudes</b>		
Ability to work under pressure and at a fast pace whilst maintaining attention to detail and accuracy.	✓	
Excellent computer literacy and associated skills, such as the ability to use Excel, Word and PowerPoint, to produce graphs, presentations etc.	✓	
Ability to think creatively to solve problems and take initiative.	✓	
Self-motivation and ability to work alone and in a small team without supervision.	✓	
A flexible, helpful and positive professional attitude.	✓	
Willingness to travel occasionally for work outside of London and attend occasional events in the evening.	✓	
A strong sense of empathy for people, the planet and our culture & heritage.	✓	
Good moral judgement and a commitment to supporting the aims of the charities.	✓	
Ability to respect all confidentiality.	✓	
Aptitude for and experience of managing work on databases.		✓
Knowledge and experience of working with/for high net-worth families.		✓
An understanding of and interest in the current issues affecting the charitable sector.		✓



## TIMETABLE

Deadline	10.00am on Monday 29 April
First stage interviews	7, 8 and 9 May
Panel interview	17 May
Final interview (if needed)	20 or 21 May

Please keep some time free on the interview days.

## TO APPLY

To apply for this post, **please send your CV and a completed application form** (downloaded from [this link](#)) to our recruitment adviser, Allyson Davies, at [SF@allysondavies-consultant.com](mailto:SF@allysondavies-consultant.com) by **10am on Monday 29 April 2019**.