Grants Officer

Candidate Information Pack

**Please find enclosed:**

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For background on the Bernard Sunley Foundation

go to <http://www.bernardsunley.org>

If you’d like to discuss this role further, please contact Allyson Davies, our selection advisor at [BSF@allysondavies-consultant.com](mailto:BSF@allysondavies-consultant.com) or call 0796 855 6164.

**BACKGROUND INFORMATION**

**Bernard Sunley Foundation**

The Bernard Sunley Foundation is a family grant making foundation which supports charities in England and Wales working to raise the quality of life and provide greater opportunities for the young, the elderly, the disabled and the disadvantaged.

The Foundation has awarded over £125 million in grants since it was established in 1960. Each year, the Foundation awards just over £4 million to capital projects that deliver a real community focus or provide facilities to support those in need. Grants are made across the Foundation’s four funding categories of community, education, health, and social welfare. In the last financial year, the Foundation made 367 grants, totalling £4.282 million.

The Foundation’s Board of Trustees comprises mainly family members, with the day-to-day running of the charity overseen by a full time Director, a Grants Officer and a Finance Officer. The team works out of a central London location, in serviced offices.

**Purpose of the role**

The Foundation offers three levels of grants. These are large grants of £20,000 and above; medium grants of up to £20,000 and small grants of £5,000 and under. The large and medium grants are considered and agreed upon at the three annual Trustees’ meetings. The small grants are agreed by Trustees on a monthly basis and form the majority of the Foundation’s grant giving. The Grants Officer will be responsible for overseeing these monthly grant applications and for obtaining the Trustees’ approval. The Grants Officer will also help with assessing the medium and large grants, working closely with the Director.

The Grants Officer will join our small, hardworking, friendly team and will work with us to deliver a busy grants programme. The role enables the funding of projects that help to foster a better sense of community; provide opportunities for disadvantaged young people and also can help to support people with learning difficulties to live fuller lives in their community. These are just a few examples of the significance and impact that the Foundation’s capital grants can have across a wide range of charities. The Grants Officer will also contribute to the ongoing development of our work and will enjoy improving and refining systems and processes, as well as taking part in talking about how we deliver our vision.

**About you**

This role would suit a range of candidates and we are open to candidates without grant making experience but they will need an understanding and knowledge of the grants world. We are particularly keen to hear from people who: -

* Share our passion for the work and have an interest in our priority areas and would like to develop expertise and knowledge in some of them.
* Have good communication and relationship building skills and a commitment to working as part of a small, friendly team.
* Have some experience of working with numbers and are confident working with them (training is available to develop skills in this area).
* Can work both independently and collaboratively and know when to ask for support or guidance.
* Enjoy managing a varied workload with a range of different deadlines and have an appreciation of the importance of avoiding bottle necks in the flow of work.
* Are energetic, supportive, enthusiastic and analytical.
* Have good level of database experience and a genuine interest in the contribution a database can make to a well-run grants programme.

**JOB DESCRIPTION**

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| **Job title** | Grants Officer |
| **Salary** | c.£32,000 plus a pension contribution of 10% of annual salary and 25 days annual leave |
| **Hours** | Full time (35 hours per week: 9am to 5pm, Monday to Friday) |
| **Reports to** | The Director |
| **Purpose** | The Grants Officer is responsible for the day-to-day administration and management of BSF’s grants programme |
| **Location** | Hybrid: three days in central London office (Green Park), two days from home |

**Grants management**

* Provide advice and support to charities seeking to make an application, managing expectations as necessary.
* Assess grant applications, with responsibility for the ongoing monthly grants process, and assess the medium and large grants as required by the Director.
* Write up clear, concise summaries as part of the grant application process and make recommendations according to the Foundation’s eligibility criteria.
* When required, visit charities and write up site visit reports.
* Prepare a draft list of monthly grants for the Director each month, by an agreed date, and distribute the final list for comment and approval by the Trustees.
* Assist with the preparation of papers for the Foundation’s three annual Trustees’ Meetings. Work closely with the Director to coordinate the Grants section of the Trustees’ papers, including collating all site visit reports, obtaining visuals and proofreading as required.
* Working with the Director, keep the grants and office systems and processes under review to maintain best practice.

**Grants administration**

* Respond to initial enquiries from grant applicants via email or phone.
* Manage and maintain the grants database system.
* Manage the communication to applicants by sending grant offer letters, reject letters and all other communications, as agreed with the Director. Work with the Finance Officer to co-ordinate the timings of grant offers to all charities.
* Work closely with the Finance Officer to provide any necessary help with enquiries about grant payments.
* Maintain quality data records on applicants and past information.
* Provide administrative support as needed to the Director and Chairman, Trustees and family members to arrange meetings, site visits, provide information on applicants and any other administrative support that may be required.
* Liaise with the Director and the Finance Officer in relation to absence from the office, such as lunch breaks and arranging annual leave, to ensure that office cover is maintained as required.
* Provide support as required for booking meeting rooms both internally and externally.
* Help to meet and greet guests, Trustees and family members and assist with any catering and hospitality arrangements as requested.

**General**

* Be available for occasional travel and meetings outside of normal working hours as and when requested.
* Job descriptions are not exhaustive; the jobholder may also be required to undertake other duties that are broadly in line with the above key responsibilities.

**PERSON SPECIFICATION**

E = essential, D = desirable

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| --- | --- | --- |
| Experience | E | D |
| Understanding and knowledge of the processes of grant making and monitoring (additional training can be provided if required). | ü |  |
| Experienced and competent in IT and databases particularly in using Microsoft Office. | ü |  |
| Experience of using a grants database system – Salesforce is the office database system. |  | ü |
| Skills |  |  |
| Excellent interpersonal skills in person, on the telephone and by email. | ü |  |
| Excellent verbal and written communication skills, including the ability to write clearly and to present complex information concisely. | ü |  |
| High levels of attention to detail with an ability to work accurately and methodically. | ü |  |
| Well organised and able to prioritise and manage a varied workload and work to deadlines. | ü |  |
| Ability to understand and interpret financial accounts (training will be provided if required for this). |  | ü |
| Excellent team working skills. | ü |  |
| **Personal Attributes** |  |  |
| Co-operative and a strong team player, with good emotional intelligence | ü |  |
| Self-motivated, communicative, enthusiastic and able to work both independently and collaboratively. | ü |  |
| Good degree of flexibility with a willingness to take on potential tasks at short notice and/or to undertake a range of tasks as required in a small, busy office. | ü |  |
| Hardworking with a high degree of integrity and professionalism. | ü |  |

**THE RECRUITMENT PROCESS TIMETABLE**

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| --- | --- |
| Deadline for applications | Monday 27 February @ 10am |
| Screening interviews | Week of 6 March (please keep some time available on these dates) |
| Panel interviews (in person) | 15 March |
| Final interview (in person)  and meet the Chair | 17 March |

**To apply**

If you would like to apply for this role, please complete the **Application Form** (download form) and **Equal Opportunities Monitoring Form** (download form) plus attach a **CV** outlining your career to date along with any academic and professional qualifications.

Please send these three documents, **by 27 February @5pm**, to [BSF@allysondavies-consultant.com](mailto:BSF@allysondavies-consultant.com)

**Further information**

If you require any further information or you would like to discuss anything in more detail, please contact Allyson at the above email, or call 0796 855 6164.

**Data Protection**

The personal information that you provide will be used to process your application for employment with the Bernard Sunley Foundation. Personal information about unsuccessful candidates will be held securely for six months after the recruitment exercise has been completed; it will then be destroyed or deleted. If your application is successful and you take up employment, the information will be used in the administration of your employment with us. It will be kept secure and will only be used for purposes directly relevant to your employment.