

Dear Applicant

## Grants Officer Application Pack

Thank you for your interest in the post of Grants Officer at Clergy Support Trust. This is an exciting time to be joining us as we continue to deliver on our strategic plan for 2019-22 and beyond. Last year, we re-launched the charity with a new brand, website and a fresh four-year strategy, with the aim of reaching more Anglican clergy families in need of our support.

Our new grants policy, introduced in July 2019, aims to help current Anglican clergy and their families, as well as retired, former and separated and divorced spouses/partners, when they are in need. Our grants policy aims to help in the following areas:

- Financial support grants of up to £3,000 per clergy household per year.
- Emergency grants of up to £500 per clergy household for sudden, unexpected costs.
- Health grants where NHS treatment is unavailable or waiting lists are unreasonable.
- Wellbeing grants of a more preventative nature, such as for holidays and sabbaticals.
- Debt support for clergy families struggling with unsustainable levels of personal debt.

Working as part of a small but friendly staff team (8 staff), and within the grants team (currently 3.6 FTE staff), the postholder will be responsible for dealing with grant-related enquiries, assessing grant applications in line with the grants policy and ensuring all grants are processed efficiently and professionally. Our charitable activities are focused on Anglican clergy and their families, so we are looking for a grants professional who is able to understand and empathise with the challenges of clergy life. We encourage applications regardless of religious beliefs.

Established in 1655, Clergy Support Trust is one of the oldest Anglican clergy support charities, and now certainly the biggest, with investment assets of almost £120 million. The charity provides financial grants and other support to serving and retired clergy, ordinands and clergy families where there is particular hardship or need, whether financial or health-related. In 2019 the charity gave out grants totalling £3.1 million to over 906 individual clergy households facing hardship or other difficulties. We are looking as part of our new strategy to develop our charitable services to include preventative support and other wellbeing solutions and hope to double the number of beneficiary households we support going forward.

If you are keen to join to small and friendly team where your decisions will positively impact clergy families, then we'd love to hear from you.

## Sarah Crombie

Director of Charitable Services

**Clergy Support Trust**  
(Charity number 207736)  
**Job Profile**

**Part 1: Summary job details**

- Job title:** Grants Officer
- Contract basis:** Permanent, full-time
- Reporting to:** Director of Charitable Services (DCS)
- Direct reports:** None
- Based:** The charity's Westminster office
- Annual salary:** £30-£35,000 depending on experience

**Part 2: Job description**

**Job purpose:**

The Grants Officer is the main point of contact for all individual applicants to the Charity and works with colleagues to ensure that grant applications are processed efficiently, in line with grants criteria and applicants are dealt with compassionately and professionally.

**Major responsibilities:**

The major responsibilities of the role are as follows, liaising at all times with applicants, other Grants Officers, DCS, medical and educational advisors and other charity staff:

1. Dealing with applicant enquiries
2. Processing individual applications
3. Supporting applicants
4. Supporting grant decisions
5. Implementing grant decisions
6. Feedback and development
7. Other reasonable duties and projects commensurate with the post

**Key tasks:**

**1. Dealing with applicant enquiries**

**Role purpose:** To ensure a pleasant, helpful and empathic welcome to applicants contacting the Charity by email or phone.

**Key tasks:**

- Provide guidance to applicants in relation to the Charity's grants criteria and process, ensuring they understand how to apply and that their request fits within our criteria.
- Answer the phone in a timely manner, ensuring all callers are dealt with in a professional manner.
- Monitor the 'grants@' email address and respond to messages or pass them to colleagues in a timely and efficient way.
- Liaise with the Senior Grants Officer where necessary, for advice and guidance.

**2. Processing individual applications**

**Role purpose:** To ensure that grant applications are processed in an efficient and timely manner.

**Key tasks:**

- Verify that applicants meet the charity's eligibility criteria.
- In the absence of the Senior Grants Officer, import applications on a daily basis and distribute them amongst the team. Prioritise any applications with particular genuine urgent requests and de-dupe within the Grants Management System (GMS).
- Check that each application is complete and follow up with applicants as required to ensure all information and supporting documents have been submitted.
- Undertake a financial assessment of means-tested applications with reference to the Charity's benchmarks and policies in order to establish eligibility.
- Input required data into the GMS and use the system to process all elements of an application.
- Liaise with applicants regarding health / school fee related requests, ensuring they understand the role of the Advisor and gain signed consent forms.
- Refer and liaise with Advisors to assess cases and receive reports as required.
- In periods of team member absence, ensure all applications are monitored and dealt with appropriately.
- Undertake administration of all applicant and grant information to ensure data is kept and disposed of appropriately under GDPR policies.
- Suggest ways in which the grant-making process could be improved.

**3. Supporting applicants**

**Role purpose:** To provide applicants with appropriate support in a compassionate and professional way in all of their contacts with the Charity.

**Key tasks:**

- Provide clear guidance to applicants throughout the application process.
- Inform applicants of other potential sources of help and support (e.g. state benefit entitlements, other benevolent funds, charities with an interest in Anglican clergy etc.)
- Respond to applicant queries quickly and accurately throughout the application process.

#### **4. Supporting grant decisions**

**Role purpose:** To adhere by the Charity's governance policies and processes to ensure good grant-making decisions, that meet the objects of the Charity.

**Key tasks:**

- Prepare objective reports for each case with appropriate, clear recommendations. Include case evidence, advisor reports, where necessary.
- Consider if cases should be referred to Senior Management or trustees, in line with the existing Grant Making Policy.
- Present Trustee cases to the DCS for review before requesting a decision via the virtual Trustee Grants Panel, or at the next available Board meeting.
- Make adjustments to case reports / recommendations where necessary, ready for board meetings.
- Present cases to the board of trustees and respond to any queries raised.

#### **5. Implementing grant decisions**

**Role purpose:** To ensure grant decisions are implemented efficiently.

**Key tasks:**

- Update GMS with grant decision and payment date/s.
- Liaise with Grants Team and Accounts to ensure correct payments are made.
- Notify applicant of grant decision, payment details, reason for decline, signpost to other sources of help, conditions of grant etc.

#### **6. Feedback and development**

**Role purpose:** To assist the Charity in improving its grant-making policy and procedures, in line with beneficiary need.

**Key tasks:**

- Propose improvements to policy and procedures at Team Meetings.
- Log beneficiary feedback, ready to use as potential testimonials, case studies etc.
- Identify areas of potential improvement within the GMS and report to GMS Lead.
- Work alongside the Charity's Marketing and Communications Manager, assisting with requests for testimonials, data, potential case studies etc, for marketing and communication purposes.

#### **7. Other reasonable duties and projects commensurate with the post**

Includes but not limited to:

- Adhere to the charity's policies at all times.
- Supporting colleagues and attending the Charity's Annual Festival, AGM, Trustee away day etc.
- Reviewing and evaluating own performance and identifying and acting upon areas for improvement and development.

## Part 3: Person specification

Attribute	Essential	Desirable
General education	A-Levels or NVQ equivalent	Degree
Experience, skills and abilities	<p>Previous experience within a grant-making role or proven knowledge of the grant making / benevolence sector.</p> <p>Ability to interpret grant criteria effectively and make clear decisions.</p> <p>Experience of dealing with confidential, personal and sensitive information.</p> <p>Excellent customer service skills, offering support to beneficiaries throughout the grant making process, and other sources of potential help.</p> <p>Ability to work in a methodical manner, organising own workload and ability to prioritise urgent applications and other project work.</p> <p>Excellent attention to detail.</p> <p>IT literate (MS Office, databases; Benefactor, Email, etc).</p> <p>Excellent communication skills (both written and oral).</p> <p>Excellent inter-personal skills and demonstrable ability to work in a small team.</p>	<p>A knowledge of the Church of England and the challenges facing those in ordained ministry, or training for ordination.</p> <p>Previous experience of co-ordinating and referring beneficiaries to support services (eg debt support).</p> <p>An interest and understanding of the challenges faced by clergy families.</p> <p>Knowledge of the welfare benefits system.</p>
Personal	<p>Good team player, highly motivated and with a 'can do' attitude, willing to contribute to the overall success of the charity.</p> <p>Ability to work under pressure.</p> <p>Demonstrable sympathy with the Christian ethos of the charity.</p>	

## Part 4: Detailed job particulars

<b>Job title:</b>	Grants Officer
<b>Contract basis:</b>	Permanent, full-time (subject to six months' probation)
<b>Reporting to:</b>	Director of Charitable Services
<b>Direct reports:</b>	None
<b>Location:</b>	The charity's head office at 1 Dean Trench Street, Westminster, London SW1P 3HB
<b>Hours of work:</b>	35 hours per week worked flexibly but normally between 09.00 and 16.30 with an unpaid break of 30 minutes for lunch. Overtime is not normally paid, but the postholder will be able to take time off in lieu in line with our flexi-leave policy.
<b>Salary:</b>	£30,000 to £35,000 per annum depending on experience.
<b>Pension:</b>	The postholder will automatically be enrolled into the charity's pension scheme, which attracts an employer contribution equivalent to 10% of basic gross salary.
<b>Death in service:</b>	Life Assurance (Death in Service cover) of 4x salary will be provided for your spouse/dependants in the event of your death whilst you are an active employee of the charity.
<b>Holiday:</b>	The standard annual holiday entitlement in any holiday year is 28 days, exclusive of recognised public holidays but including three days between Christmas and New Year when the office is closed.
<b>Circumstances:</b>	Able and prepared to work from the charity's office in Westminster. The role is not suitable for home-based working or as a job share post.

## Part 5: How to apply

To apply, please email the following to Sarah Crombie, Director of Charitable Services ([sarah.crombie@clergysupport.org.uk](mailto:sarah.crombie@clergysupport.org.uk)) by **Wednesday 11th March 2020**:

- Curriculum Vitae
- Covering letter (no more than two sides of A4) explaining why you are interested in the role and how you meet the person specification requirements (please provide specific examples in your supporting statement)
- Completed copy of the attached Criminal Record Declaration form

First interviews are scheduled for w/c 16 March 2020 and second interviews scheduled for w/c 23 March 2020.

If you would like to arrange an informal chat in relation to the role, please contact Sarah on [sarah.crombie@clergysupport.org.uk](mailto:sarah.crombie@clergysupport.org.uk)

If you have a disability and would prefer to apply in a different format or would like us to make reasonable adjustments to enable you to attend interview, please contact us **as above** and we will be in touch with you about how to help.

For more information, please visit: [www.clergysupport.org.uk](http://www.clergysupport.org.uk)