

Dear Applicant

Grants & Services Officer - Application Pack

Thank you for your interest in the post of Grants & Services Officer at Clergy Support Trust. This is an exciting time to be joining us as we embark on our new strategic plan for 2022-25. This follows a period of growth over the last few years, where we have tripled the number of clergy families helped. Due to this growth, we are seeking a new Grants & Services Officer to join our expanding team, providing support and guidance to our beneficiaries.

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 (14 staff), and within the grants team (currently 6 FTE staff), the post-holder 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. A growing part of the role is providing guidance, referrals and signposting to our support services (via various partnerships) to enable a true holistic approach to supporting our beneficiaries. 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 from those of all religious beliefs and none.

Established in 1655, Clergy Support Trust is the largest and oldest charity supporting clergy and their families, with investment assets of over £130 million. In 2021 the charity gave out grants totalling £3.1 million to over 1,610 individual clergy households facing hardship or other difficulties. Our aim over the next few years is to expand our support further, especially on preventative support, including an information hub and more interactive online support.

Clergy Support Trust is an inclusive and supportive organisation. We warmly welcome applications from candidates of all backgrounds, and believe a diverse workforce leads to fresh ideas and creative thinking, as well as reflecting our diverse beneficiary base across the UK and Europe. 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

Part 1: Summary job details

Job title:	Grants & Services Officer
Contract basis:	Full-time, permanent (35 hours a week), subject to satisfactory completion of six-month probation period
Reporting to:	Director of Charitable Services (DCS)
Direct reports:	None
Based:	We operate a ‘mixed-mode’ working model, where staff work both from home and from our spacious offices in Westminster; details will be discussed with shortlisted candidates
Annual salary:	£30-£35k p.a. depending on experience

Part 2: Job description

The principal responsibilities for the Grants & Services Officer are; to be the main point of contact for all individual applicants to the Charity, working with colleagues to ensure that grant applications are processed efficiently (in line with grants criteria) and applicants are dealt with holistically, compassionately and professionally.

Main responsibilities:

The main responsibilities of the role are as follows, working alongside other Grants & Services Officers, Director of Charitable Services, medical and educational advisors and other charity staff:

1. Dealing with applicant enquiries

- To ensure a pleasant, helpful and empathetic welcome to applicants who contact the Charity by email, web form, grant application or telephone.
- Provide guidance to applicants in relation to the Charity’s grants criteria, services 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.
- Identify any potential safeguarding concerns at an early stage, escalating appropriately and in the timescales outlined in the Charity’s safeguarding policy and procedures.
- Liaise with the Senior Grants Officer or Director of Charitable Services as necessary, for advice and guidance.

2. Processing individual applications to ensure grant applications and referrals to services are processed in an efficient and timely manner

- Verify that applicants are eligible beneficiaries and meet the Charity’s criteria.
- Prioritise any applications with particularly 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.

Job Profile – Grants & Services Officer

- Undertake a financial assessment of means-tested applications with reference to the Charity's Minimum Income Standard calculator in order to establish eligibility.
- Input required data into the GMS and use the system to process all elements of an application, which may also be used for reporting purposes.
- Liaise with applicants regarding health / school fee related requests, ensuring they understand the role of the Medical / Education Advisor and gain signed consent forms.
- Refer and liaise with Advisors to assess cases and receive reports as required.
- Liaise with applicant in relation to potential referrals to partner support services (such as help and advice with debt, occupational therapy assessments, help with sleep or insomnia, accessing counselling etc).
- 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.
- Be proactive by suggesting improvements for grant-making and support service processes.

3. Supporting applicants in a compassionate and professional way, providing guidance and information

- 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. Recommend appropriate grant decisions, adhering to the Charity's governance policies to ensure good grant-making decisions that meet the objects of the Charity

- Prepare objective, non-judgemental reports for each case, with appropriate, clear recommendations in line with the grants policy. 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 Trustee 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 in a timely manner

- Update GMS with grant decisions, partner referrals, payment dates, scheduled payments etc.
- Liaise with Senior Grants Officer to ensure payments are made accurately and timely.
- Notify applicant of grant decision, payment details, reason for decline, signpost to other sources of help, conditions of grant, request receipts or invoices etc.
- Log beneficiary feedback including thank you messages, any dissatisfied comments, potential case studies for marketing purposes.
- Draft case study examples for Trustee meetings.
- Arrange or diarise follow-up appointments for priority applicants where extra support is needed.

6. Other reasonable duties and projects commensurate with the post, including:

- Attend team and staff meetings raising any potential issues relating to beneficiaries.
- Adhere to the charity's policies at all times.
- Support colleagues with national and local events such as the Charity's Annual Festival and Annual Assembly.
- 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 or equivalent	Degree Trained in the principles of safeguarding children and adults at risk.
Experience, skills and abilities	<p>Previous experience within a grant-making role or proven knowledge of the grant-making / benevolent sector.</p> <p>Ability to interpret grant criteria effectively and make clear decisions.</p> <p>Proven experience of providing help and guidance, predominately over the phone and via email, offering support to beneficiaries throughout the grant making process, and other sources of potential help.</p> <p>Previous experience of prioritising help in a methodical manner for individuals who may be at crisis point and have the skills to manage expectations.</p> <p>Ability to multi-task, work in a well-organised manner, manage own workload and ability to prioritise urgent applications.</p> <p>Experience of dealing with confidential, personal and sensitive information.</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>

Attribute	Essential	Desirable
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: Further job particulars

Hours of work: 35 hours per week worked flexibly. The Trust’s ‘core hours’ are 0900 – 1630, Monday to Friday.

Pension: The post-holder will automatically be enrolled into the Trust's pension scheme, which attracts an employer contribution equivalent to 10% of basic gross salary.

Death in service: 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 Trust.

Holiday: The standard annual holiday entitlement in any holiday year is 25 days, exclusive of recognised public holidays. The Trust also closes between Christmas and New Year, additional to annual leave allowances.

Part 5: How to apply

To apply, please email the following to the Director of Charitable Services, Sarah Crombie, on sarah.crombie@clergysupport.org.uk

- 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 (please provide specific examples in your supporting statement).
- Completed copy of the attached Criminal Record Declaration form.

Closing date for receipt of applications: 1pm, Monday 28th February 2022.

Interviews will take place at our Westminster offices (in accordance with Covid-19 government guidelines) and are likely to take place w/c 7th March 2022.