

## **Grants Manager – Application Pack**

### **Background Information**

The Sir Halley Stewart Trust is a registered charity (number 208491) that typically awards approximately £1,000,000 of funding per year to innovative research and development projects in the medical, religious and social fields. The focus of the Trust's work is the prevention of human suffering and distress, both in the UK and overseas, with a view to enabling the projects it funds to become self-supporting.

Founded in 1924 by pioneering industrialist and philanthropist Sir Halley Stewart, the Trust is underpinned by Christian values and in recent years has been increasingly involved in multi-faith issues. Our Trustee Board is currently comprised of several direct descendants of Sir Halley Stewart, academic specialists and those with practical expertise in our areas of operation. For a full list of current Trustees, please visit our website here: [www.sirhalleystewart.org.uk/who-we-are/trustees](http://www.sirhalleystewart.org.uk/who-we-are/trustees).

We are now seeking an outstanding individual to join the Trust as our new part-time Grants Manager and second member of staff. Working closely with our Director and volunteer Trustees, we are looking for an individual with exceptional interpersonal skills, strong attention to detail, grant-making experience, financial competence and an affinity with our areas of charitable support.

This is an exciting time to join the Trust. In addition to our ongoing grant-making activities, we are developing new co-funding partnerships, exploring innovative ways to connect grantees and encourage collaborations, and evaluating the longer-term outcomes and impacts from our funding as we approach our centenary celebrations in 2024.

### **Job Description and Person Specification**

#### **Summary**

The Grants Manager will lead on the Trust's day-to-day grant-making activities and the administration of the Trust, and support the Director in the Trust's wider operations. It is critical the appointee is a confident self-starter with exceptional attention to detail.

Candidates may come from a range of backgrounds, but should have experience of grant-making and working with Board members, and be able to demonstrate a commitment to the voluntary sector as well as empathy with the ethos of the Trust. First class written and verbal communication skills will be key, as will the ability to process complex information, financial acumen and excellent IT skills. The successful candidate will be highly organised and able to build relationships with people at all levels.

The post is a home-based position, and an external company provides the necessary infrastructure support. The Trust Partnership manages the Trust's IT resources and services; provides and arranges electronic and physical document storage and backups; and conducts filing, archiving, printing and postal services for the Trust. The Grants Manager will therefore be able to work in a paperless home environment as far as possible.

The Grants Manager will be supported by, and work closely with, the Trust's Director. The Trust's Director works the equivalent hours of two days per week, spread across the week so they can provide swift responses and support to the Board and Grants Manager. The new Grants Manager would have the option to either work 3.5 full days, or split the equivalent hours across the week if they prefer.

## **Job Description**

Job Title	Grants Manager
Employer	Sir Halley Stewart Trust
Reporting to	Director of the Trust
Location	Home-based, with attendance at three Trustee meetings in Central London per year
Hours	Part-time role working 24.5 hours per week (equivalent to 3.5 days per week, based on a 35 hour / five day working week FTE)
Salary	c. £35,000 pro rata (£24,500 per annum), depending on experience
Pension	The Trust will contribute 5% of gross salary to a workplace pension plan, after the probationary period
Holiday entitlement	Pro rata holiday allowance (FTE is 25 days plus public holidays)
Probationary period	The post is subject to a six-month probationary period

## **The Role**

- To be responsible for the management and delivery of the Trust's grant-making processes, from initial application enquiries to monitoring and evaluating grant reports.
- To work closely with the Director and Honorary Treasurer on financial aspects of the Trust's activities, from setting up payments and financial record-keeping, to liaising with accountants, auditors and investment managers as appropriate.
- To lead on other administrative tasks necessary for the Trust's operations, and to provide support to the Director and Board in order to ensure the charity complies with legal obligations and sector best practice.

## **Responsibilities**

### **Grant-making**

- To handle all of the Trust's routine day-to-day correspondence and be the primary point of contact for applicants and grantees
- To advise potential applicants about applying to the Trust for grants and deflect ineligible applications
- To provide an initial eligibility assessment of grant applications
- To prepare and circulate application packs on eligible proposals for the Director and Trustee Sub-Committees to assess in detail
- To prepare information for the Board regarding short-listed proposals by the Director and Sub-Committees, and to liaise with applicants to obtain any additional information required prior to Board meetings
- To implement the decisions of the Trustees in a professional and timely manner
- To offer feedback calls to unsuccessful applicants
- To issue Grant Offer Paperwork to successful applicants, and be the first port of call of all grantee communications

- To ensure that grantees submit reports for evaluation at agreed intervals and monitor the progress of funded projects. To review all grantee reports and circulate to the Director and Trustees as appropriate, making any necessary recommendations and / or highlighting key points to note. To liaise with grantees regarding any follow-up information required, and provide feedback from the Trust as appropriate
- To maintain and update the Trust's grants database and online application process as required
- To support the Trustees in their charitable objective of making grants within the terms of the Trust Deed

#### Financial and General Administration

- To be the primary administrator and banking lead for the Trust's Current Account
- To set-up all grant payments to UK charitable organisations in accordance with Trustees' decisions and grant conditions, for co-authorisation by the Director / Trustees as appropriate
- To set up all other Trust payments (including in response to invoices and expenses claims), for co-authorisation by the Director / Trustees as appropriate
- In conjunction with the Director and The Trust Partnership, to maintain, renew and ensure timely payments for Trust services, subscriptions and renewals (including insurance policies, ICO payments, website hosting, domain renewals, telephone service and postal service arrangements)
- To keep accurate financial records
- To provide regular grants reconciliation and other payment information to the Trust's Director and accountants
- To work with the Trust's Director to provide all relevant grant and financial information requested by the Trust's auditors
- To maintain and update the Trust's website
- To conduct annual digital archiving and ensure ongoing compliance with the Trust's Document Retention Policy and Data Protection Policy (NB: The Trust Partnership will be responsible for the archiving of physical files)
- To explore longer-term physical and digital archiving opportunities for the Trust's historic archives

#### Meetings

- To coordinate and confirm dates for Sub-Committee and Trustee meetings if required
- To organise venues and speakers for meetings if required
- To prepare supporting information for the Director and the Board regarding grantees and applications under consideration at Trustee meetings
- To attend three Board meetings per year in Central London, and other ad hoc events / meetings if appropriate
- To deputise for the Director at such meetings if required (e.g. in the event of illness or other absence)

### Compliance

- To work closely with the Trust's Director in order to enable the Trustees to fulfil their responsibilities for the proper governance of the Trust, ensuring they receive advice and information in a thorough and timely manner
- Ensuring adherence to all of the Trust's policies, including Data Protection, Confidential Information, Risk Register, Scheme of Delegation and Safeguarding

### External / Strategic

- To develop the profile and reputation of the Trust with its charitable stakeholders, and nurture relationships with grant recipients and prospective grantees
- To work closely with the Director, Honorary Treasurer, accountants, auditors and investment managers on the financial activities of the Trust
- To represent the Trust at important sector / grantee events if appropriate

### Other

- To support the organisation of ad hoc events (such as grantee dissemination events), periodic Trust publications, and specialist grant rounds or other activities that further the Trust's mission
- To provide support and fulfil any other duties that may be reasonably required by the Director and Trustees from time to time

### **Person Specification**

#### Essential knowledge and experience

- First class written and verbal communication skills
- Highly organised and confident self-starter, with a flexible approach and able to work well alone
- Previous grant-making experience
- Experience of working with a Board of Charitable Trustees or equivalent Non-Executive Body
- Experience of minute-taking and producing board papers
- Exceptional attention to detail
- Demonstrable experience of keeping accurate records
- Relevant financial experience and strong numerical acumen
- Ability to work effectively within a small team
- Excellent IT skills
- Demonstrable experience of reviewing, analysing and summarising complex material
- Ability to work with people at all levels, and experience of representing an organisation externally
- Awareness of issues currently facing the UK voluntary sector
- Empathy for the Trust's ethos and priority areas

Desirable knowledge and experience:

- Educated to degree level
- Experience of effective home-working
- Experience of implementing IT systems and maintaining a website
- Experience of the Salesforce database

## **Application Process**

Applicants wishing to be considered for the role of Grants Manager should submit a CV and covering letter to our recruitment consultant, Jacqueline Rae. These should be emailed by **the end of Sunday 31 January 2021** to [recruitment@issimo.co.uk](mailto:recruitment@issimo.co.uk). All applicants will receive confirmation of safe receipt. Please note:

- Your covering letter should include a personal statement addressing the job description and person specification, and explaining why you believe you are suitable for the post.
- Your covering letter should also include the length of any notice period you may have, and the names of two referees – ideally one referee should be your most recent employer (referees will not be approached without your permission).
- Your CV and supporting letter, including your personal statement, should be no longer than five sides of A4 in total. The ability to present information clearly and succinctly is an important attribute for this role.

Following short-listing, selected applicants will be invited to have an **interview in the week commencing 15 February 2021**, with the successful candidate taking up their post as soon as possible. Interviews will most likely take place via a Zoom videoconference given current Covid-19 restrictions.

If you have questions at any point of the recruitment process, please contact the Trust's recruitment consultant, Jacqueline Rae, at [recruitment@issimo.co.uk](mailto:recruitment@issimo.co.uk).

### **Personal Data:**

The Trust will collect and process personal data about you in connection with the recruitment process, together with any additional information you may provide to us. This includes your name and contact details, CV, education, former employment and career history and academic qualification certificates and professional affiliations.

The Trust will use your personal data to administer your application, including the assessment, screening, and interview process and any subsequent offer to be appointed as Grants Manager and subsequent on-boarding activities; to assess you against other candidates and obtain references.

The Trust's legal basis for processing your personal data is that the processing is necessary for the Trust's legitimate interests in appointing new employees and maintaining an appropriately skilled and diverse workforce.

Further details of the Trust's Privacy Policy, including how to exercise your rights in relation to your personal data, can be found here: [www.sirhalleystewart.org.uk/eligibility-and-guidelines/data-protection-statement](http://www.sirhalleystewart.org.uk/eligibility-and-guidelines/data-protection-statement).

You can also contact the Trust's Director, Ms Vicky Chant at [director@sirhalleystewart.org.uk](mailto:director@sirhalleystewart.org.uk), if you have any questions about the use of your personal data.

## **Further Background Information**

### **The Trustees**

The Board meets in London three times per year (in February, June and October) to award grants and manage the Trust's affairs. Communication in between meetings is primarily via email, or telephone / post where required. In addition to their role on the Board, Trustees are also usually a member of one or more of the Trust's grants Sub-Committees:

- Social Sub-Committee
- Religious Sub-Committee
- Medical Sub-Committee

The three Sub-Committees assess applications in each grant round following the Director's initial reviews, and the Sub-Committees make funding recommendations to the Board at each Trustee meeting. The Sub-Committees also meet approximately once every year or two years to discuss relevant policy areas.

- Finance Sub-Committee

This Sub-Committee, led by the Honorary Treasurer and comprised of Trustees and financial consultants, meets four times per year to manage the financial affairs of the Trust and make recommendations to the Board.

### **Grant Priorities and Funding**

The Trust typically provides two types of funding awards:

- Main Grants – primarily given in the form of a salary contribution, ranging from £5,001 to £60,000 in total over up to three years. These are awarded at one of the Trust's three main grant meetings per year in February, June and October.
- Small Grants – one-off grants of up to £5,000. These are awarded throughout the year.

We occasionally provide other types of funding, for example we are currently running a Covid-19 Emergency Support Grants programme, and are working in partnership with other funders to support projects in specific areas.

### **Medical Priorities**

The Trust funds medical projects that are practical and capable of clinical application within five to ten years. The Trustees welcome applications directly from researchers at UK medical institutions or university departments concerned with:

- Improving the quality of life of older people suffering from physical or psychological disorders.
- The prevention of disease and disability in children.
- The prevention, diagnosis and treatment of tropical infectious and parasitic diseases.
- Innovations, involving any discipline, which are likely to improve health care.
- Innovations in medicine for caring for the needs of disadvantaged groups

### Religious Priorities

The Trust is committed to advancing Christian religion. The Trustees are particularly interested in innovative and practical ecumenical projects in the UK; and also those in countries outside the UK where there is a special and specific need.

Trustees seek to support ground-breaking inspirational projects that will achieve demonstrable benefits, which will then be disseminated widely. Current priorities are:

- To encourage Christian people to uphold, engage and communicate their faith in the public domain.
- To encourage dialogue between Christian faith and contemporary issues in a secular society.
- To encourage closer working relationships between Christian denominations; and / or to improve inter-faith relationships by facilitating a better understanding between faiths.
- To support and encourage the innovative education and communication of Christianity within the UK and also internationally.
- To encourage specific groups of people to explore their experience of spirituality and their spiritual needs and strengths, and to help others to understand these.

### Social Priorities

The Trust tends to be a 'first funder' – with a particular interest in providing support for feasibility, piloting, dissemination and practical implementation stages. The Trustees welcome proposals for Social research or development projects in the UK which attempt to:

- Prevent and resolve conflict, promote reconciliation, and/or encourage re-connection between family members.
- Help people to 'move beyond disadvantage'.
- Help people who may be vulnerable and/or have been exploited, particularly older people.

Such projects might be concerned with the family and social aspects of Unemployment, Crime, Imprisonment, Homelessness, Migration, Mental health and wellbeing. The Trust also funds a small number of innovative international development projects in the above subject areas, usually within Africa. Such projects must be administered by UK-based charitable organisations.

For full information on the Trust's priorities and examples of funded projects, please visit our website: [www.sirhalleystewart.org.uk](http://www.sirhalleystewart.org.uk).