# Contract basis: Full-time, permanent (35 hours a week), subject to satisfactory completion of six-month probation period

# Reporting to: Head of Grants & Services

# Direct reports: None

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# Based: We operate a ‘mixed-mode’ working model, where staff work both from home and from our spacious offices in Westminster. This role will require an average of one day a week in our Westminster office.

# Annual salary: CST Band F, which begins at £32,619. Staff also receive an

# annual cost-of-living-related salary uplift.

Part 2: About the Trust

Clergy Support Trust is the largest and oldest charity supporting Anglican ministers and their families. Put simply, it exists to serve those people who, through their ministry, spend their lives serving others. Founded in 1655, the Trust has grown significantly in recent years and, in 2023, supported 2,700 households across the UK and Ireland, through a wide-ranging programme of grants and support services. This vital work is driven by a dedicated and friendly team of just over 20 colleagues from a variety of backgrounds, overseen by a committed Board of Trustees.

This is a hugely exciting time to join the Trust. We are working hard to deliver our 2022-25 Strategy, a period of significant growth, while looking ahead to a dynamic future where we will support clergy households in new and exciting ways. Recent developments have included the establishment of new training, online and research initiatives, as well as increasing our core grant-giving activity. In recognition of this, we were pleased to be shortlisted for ‘2023 Charity of the Year’ by the Association of Charitable Organisations. We work closely with the Church and other partners to improve the financial, health and overall wellbeing of clergy and their families, and have a growing programme of external engagement, including our flagship annual Festival Service –at St Paul’s Cathedral every spring.

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 better reflecting our beneficiary base across the UK and Europe.  If you are keen to join to a small, passionate team where your skills and expertise will positively impact clergy families, and where you will be nurtured through our strong commitment to staff development (alongside an excellent package of benefits), then we’d love to hear from you.

Part 3: Key responsibilities 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 the Head of Grants & Services, Director of Charitable Services, Visiting Caseworkers, service providers 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 professionally.
* Support the Grants & Services Administrator to monitor and manage grants@ enquiries 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, Head of Grants & Services or Director of Charitable Services as necessary, for advice and guidance.

1. **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 identify duplicate applications 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 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.

1. **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.

1. **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 Charitable Services Trustee Committee.

1. **Implementing grant decisions in a timely manner**

* Update GMS with grant decisions, partner referrals, payment dates, scheduled payments etc.
* Liaise with Head of Grants & Services/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.

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

* Attend team and staff meetings raising any potential issues relating to applicants.
* 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 4: Person specification

| **Attribute** | **Essential** | **Desirable** |
| --- | --- | --- |
| General education | O level, GCSE or NVQ level 1 & 2 or equivalent. | Trained in the principles of safeguarding children and adults at risk. |
| Experience, skills and abilities | Previous experience within a grant-making role or proven knowledge of the grant-making / benevolent sector.  Previous experience of using databases / CRM systems (e.g. Salesforce).  Ability to interpret grant criteria effectively and make clear decisions.  Proven experience of providing help and guidance, predominately over the phone and via email, offering support to applicants throughout the grant making process, and other sources of potential help.  Previous experience of prioritising help in a methodical manner for individuals who may be at crisis point and have the skills to manage expectations.  Ability to multi-task, work in a well-organised manner, manage own workload and ability to prioritise urgent applications.  Experience of dealing with confidential, personal and sensitive information.  Excellent attention to detail.    IT literate (MS Office, databases; Benefactor, Email, etc).  Excellent communication skills (both written and oral).  Excellent inter-personal skills and demonstrable ability to work in a small team. | A knowledge of the Church of England and the challenges facing those in ordained ministry, or training for ordination.  Previous experience of co-ordinating and referring applicants to support services (e.g. debt support).  An interest and understanding of the challenges faced by clergy families.  Knowledge of the welfare benefits system. |
| Personal | Good team player, highly motivated and with a ‘can do’ attitude, willing to contribute to the overall success of the charity.  Ability to work under pressure.  Demonstrable sympathy with the Christian ethos of the charity. |  |

Part 5: 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 and all staff receive their birthday off.

Part 6: How to apply

To apply, please email the following to the Head of Grants & Services, Jane Pattullo, on [vacancies@clergysupport.org.uk](mailto:vacancies@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 29 July 2024.**

Interviews will take place at our Westminster offices and are likely to take place w/c **05th August 2024.**