

July 2024



Grants Monitoring Officer

Job Pack



Welcome!

We are Community Foundation Wales and we're here to inspire people to give, help Welsh communities to thrive and change lives together.

We have given more than £40m to people and community groups across Wales since 1999 – quite a success story!

Now we are looking for a talented Grants Monitoring Officer to join our fantastic team – and to help us continue to grow so we can change more lives across Wales.

We have grown over the past 25 years and now have big plans for further development, by encouraging more philanthropy and giving in Wales, so that we can further strengthen the support we give to local communities and charities.

Last year we awarded £2.3m in funding, to 571 groups and individuals. Community Foundation Wales receives income from its endowment fund, now totalling £21m, and also by providing grant programme services across Wales.

This is the perfect time to join us.

We have a strong new funding partnership with Principality Building Society to help improve the health and well-being and build the skills and talent of our future generations.

Recently we launched two key funds to address current challenges facing Welsh communities – our Nation of Sanctuary Croeso Fund and our Communities Together – Cost of Living Fund. This is alongside distributing funding from other grant schemes.

And the future looks bright. Recent research shows projections for strong growth in donor-advised giving and philanthropy.

We have more work to do to share our story in Wales, to reach out and connect with more potential supporters and to better illustrate the impact that we are having in local communities.

This post is the perfect fit for someone who wants to make a difference for people in Wales. It's a great opportunity for someone seeking flexibility through work-life balance and who can themselves be flexible.



We are particularly interested in candidates who are able to work bilingually, ideally able to hold conversations in Welsh.

We are committed to supporting and promoting equality and diversity to create an inclusive working environment so would encourage applications from candidates from under-represented minorities.

We want to be as accessible as possible and welcome you to get in touch with Asha Vijendran, Head of Grants Operations to talk through the role and discuss any accessibility requirements. You can email Asha at asha@communityfoundationwales.org.uk to arrange a call.

We follow a fair and open recruitment process that removes the barriers to appointing talented staff from diverse backgrounds and communities by removing any data from the shortlisting process that could identify a candidate.

Our equalities data collection is anonymous and is only used for us to assess our reach rather than to inform the recruitment process. We endeavour to have diverse representation on the interview panel, to help put candidates at ease.

We have a strong focus on team well-being and on development of personal and work skills. There are plenty of opportunities to learn, and to meet interesting people doing some great things across Wales, as well as working closely with our Trustees.

Through this pack, I hope you enjoy learning a little about us and the important work that happens here and that you feel we are the kind of organisation you would like to be a part of.

We look forward to hearing from you.

A handwritten signature in black ink that reads "Richard Williams". The script is cursive and fluid, with a mix of uppercase and lowercase letters.

Richard Williams
Chief Executive

About us

We inspire people to give, help Welsh communities to thrive and change lives together.

For over twenty years, Community Foundation Wales has been supporting charities and community groups with funding to strengthen communities across Wales.

Since 1999, we have awarded over £40m in grants to grassroots community groups and charities across Wales.

We work with our generous supporters to reach the people most in need and help to create positive change in Welsh communities.

Our partnerships help us to gain a stronger understanding into community needs which in turn helps us to shape funds and advise our donors to ensure effective and efficient giving.

We capture and share our learning from our philanthropic work and our grantmaking to inform our continuous development and to influence others in a position to make a difference.

There are over 42,000 community groups and charities in Wales working to improve and develop their communities, using their initiative to meet local needs. These groups and charities understand the challenges faced by people in their community and know how best to tackle these barriers.

This vital work is often carried out on a shoestring budget or voluntary basis so we focus on finding these fantastic projects and organisations, understanding what they are trying to accomplish and supporting them to do so.



Benefits of working with us:

- **For your wellbeing:** Flexible working arrangements, hybrid working, training and development opportunities as well as two days a year when you can volunteer in your community (pro rata for part-time working).
- **For your health:** 25 days annual leave (pro-rata for part-time working) plus bank holidays as well as 3 days additional leave between Christmas and New Year, long service recognition after 5 years of continuous service, cycle to work scheme, free eye test, monthly well-being initiatives, access to a Health Assured app.
- **For your financial security:** 5% contributory pension scheme, annual pay review, enhanced maternity pay, paternity leave, adoption leave, employee assistance programme that extends to family.

Our Values

We are a values-led organisation. Our values have come from our team, shape how we work and are embedded in everything we do.

We are good partners

- We respect and value our partners, be they part of our staff and trustee team, donors, supporters and people we work with.
- We understand that partnership makes us stronger and helps us to achieve more.
- We listen and use our skills and expertise to help people make great decisions and deliver results.

We care about the people we work with

- We are warm, caring and considerate.
- We act with sincerity.
- We do the very best that we can for people in Wales.

We make a difference

- We are committed to improving lives in Wales.
- We try new things, we fix problems and we learn.
- We are proactive and ambitious.



What is it like to work here?

“

Working for CFW is a really rewarding experience, it's a supportive team environment with a real passion for helping communities thrive. There is always a good balance of work and fun to be had which is a real plus.



”

Ceri Thomas, Grants Officer

“

I'm very happy working at CFW. It is very 'people oriented' both for our clients and staff and is very sensitive to and adaptable to the changing working environment that has been evolving, particularly since the pandemic, perfectly balancing staff flexibility with business needs.



”

Carol Doyle, Finance Assistant

“

CFW is a great place to work, it's a relaxed and friendly environment but with a high level of professionalism. The approach to staff is very nurturing and well-being is a key priority. In return staff give their all to achieve CFW's objectives. Communication is open and honest at all levels, which helps to create a strong team that trust each other.



”

Smitha Coughlan, Head of Finance

“

I've worked in much larger organisations before, and what struck me when I started working at CFW was how efficiently and positively everyone worked together to find solutions to problems and to resolve challenges. There's lots of opportunity to take part in professional development courses if there's something you want to build on, and everyone is encouraged to progress within their role. Flexibility is really key at CFW – if you need time to go to a doctors appointment, see your child's school play or take the car for its MOT, it's never a problem provided you can keep on top of your work, which I really appreciate.



”

Katy Hales, Director of Philanthropy



About the role

The Grants Monitoring Officer role sits within the heart of Community Foundation Wales. You will work alongside three other Grants Officers who will offer support and guidance as you settle into your role. Within the Team, you will be responsible for ensuring all grant monitoring forms are received on time and are of sufficient quality to enable us to report the impact of our funds. Our grant programmes vary from local education grants in rural parts of Wales to Wales-wide programmes tackling broad issues facing community groups.

In a typical week, you might be arranging calls with community groups to learn more about the project they have completed; reviewing monitoring forms to ensure the information they have shared is satisfactory; completing assessments on applications received; undertaking data management and analysis to produce key learnings on the outcomes of Community Foundation Wales' grantmaking, or working closely with our Head of Communications and Engagement to ensure we have inspirational case studies, that highlight the amazing work of communities across Wales.

The role will also support the Head of Grants Operations drive forward efficient and effective management of our CRM system (Salesforce), inspiring innovation on how our system can further support community groups and individuals access funding from us. As well as supporting the day-to-day operations of our grantmaking and programmes work.

We are looking for a bright and enthusiastic individual with a passion for community engagement, researching local needs, analysing data, highlighting trends, problem-solving, and supporting wider reporting requirements.

This role would suit someone who has an understanding of social issues and is passionate about the role of the voluntary sector in Wales or is very keen to learn.



Job description - Grants Monitoring Officer

Hours: Part time - 22.5 hours per week.

Some evening, weekend work and occasional overnight stays are required.

Salary: £24,000 pro rata

Responsible to: Head of Grants Operations

Location: Hybrid working: Working from home and the Cardiff office (typically 1 day per week). We would consider this post being home-based for the right candidate, with monthly visits to the Cardiff office.

Contract: Maternity Cover: Fixed term for 12 months. Role due to start mid October 2024, this is flexible.

Benefits: 25 days holiday per annum pro rata, in addition to public holidays, plus an additional three days of holidays over the Christmas period, two days volunteering pro rata, 5% contributory pension, monthly wellbeing sessions, cycle to work scheme.

Key tasks and responsibilities

Grants administration and co-ordination

Working within Grants Policy and Procedures, undertake grants administration and co-ordination duties, which include:

- Supporting the team to develop the Foundation's grants and programmes work to ensure the highest standard of client care.
- Ensuring all grant monitoring forms are received on time and are of sufficient quality to enable us to report the impact of funds back to our donors. This includes:
 - assess and evaluate the information received in monitoring forms,
 - support applicants with queries about the monitoring process,
 - request any missing information from grantees,
 - identify grantees that have breached the Terms and Conditions e.g. spent money on different costs and flag to manager to agree next steps,
 - organise visits to grantees we have concerns about following monitoring submission or failure to submit,
 - identify any underspend within projects and agree next steps,
 - chase any monitoring forms that are not submitted by the due date.
- Building relationships with grantees, particularly those with multi-year grants to further develop a strong working partnership that fosters honesty and trust.
- Managing and co-ordinating a small portfolio of grant programmes, from start to finish, which includes grant assessments, coordinating panel meetings, post panel outcomes, finance payments, monitoring analysis and evaluation.
- Maximising the use of our systems and database to support grant-making administration, analysis and broader reporting.

Business Development

Working with the wider organisational team to undertake business development support duties including:

- Keeping client/grant programme information up to date on the database.
- Supporting the production of Impact Reports, analysing grant and sector data and trends to inform our work. For example, while processing monitoring forms, identify projects that can be featured as a case study in our Impact Reports, as well as content for our website, social media channels, etc.

Communication

Undertake a variety of communication duties focused on grantmaking, including:

- Respond promptly to funding, grant applications, and beneficiary enquiries by phone/video call, e-mail and letter.
- Work closely with the Communication & Marketing Team to update the Foundations website, social media channels and newsletters with engaging case studies and content.
- Work with a wide range of partners, building strong partnerships and growing awareness about Community Foundation Wales and our impact.

Financial administration

Undertake financial administration duties as required, including:

- Using Salesforce to accurately record financial data.
- Supporting the financial administration of grant payments e.g. approve payments that are conditional on receipt of satisfactory monitoring form.

Other

- Undertake all relevant duties assigned by the Head of Grants Operations.
- Attending team meetings as required.
- Work in accordance with Community Foundation Wales' Quality Accreditation standards, policies and objectives, and mission, vision and values.
- Promote the Community Foundation Wales brand and ethos in a strong and positive manner at all times.
- Working with the Head of Grants Operations on the management and development of our Salesforce CRM system, to include streamlining, improvement of processes and expansion of functionality.

Key Skills and Experience

Essential

- Experience of being self-managing - motivated and disciplined in managing own workload, priorities, and targets.
- Demonstrable experience of working in a CRM-focused role, knowledge of Salesforce would be advantageous.
- A commitment to creating, managing, and nurturing a range of relationships with beneficiaries, partners, and donors, as well as collaborating with staff, trustees, and volunteers.
- Able to work on simultaneous projects, whilst working to tight deadlines and being calm under pressure, with experience of demonstrating a professional approach in a range of situations.
- Strong communication skills including oral and written work; reporting and research.
- Working knowledge of a range of IT systems, such as Canva, Salesforce Lightning and Experience Cloud, Office 365 (Outlook, Forms, Word, Excel, SharePoint, Co-Pilot), Hootsuite, Form Assembly, Conga, Pick Time, etc.
- The ability to work to our values.
- Experience of working in an office and/or charity environment.

Desirable

- The ability to speak and write in Welsh. We are a bilingual organisation and the ability to work in Welsh would be a strong advantage for a candidate with all the skills and experience we are seeking.
- Knowledge and insight of the Welsh voluntary sector and its needs.
- Experience of assessing the impact of grant programmes and identifying future funding needs.
- Able and willing to travel, mostly in Wales.
- Experience using Salesforce (administration, development and reporting).

How to apply

Please submit a CV along with a covering letter that highlights why you'd like to work at Community Foundation Wales, what attracted you to consider this role, and how your experience and expertise will add value to our work, helping Community Foundation Wales to fulfil its ambitions.

Please send your CV and covering letter, along with a completed equal opportunities monitoring form, to finance@communityfoundationwales.org.uk with the subject line **'Application for the role of Grants Monitoring Officer.'**

We know that interviews can be a daunting experience. If you are shortlisted, we want to put you at ease by:

- Offering the opportunity to speak with a member of the team before interview to chat about the Foundation and what it's like to work here, to help you to get to know us better.
- Committing to fully understanding any additional needs and/or any access requirements you may have, and putting any necessary requirements in place within good time.
- Sharing some of the interview questions beforehand, so that you can be well prepared, and feel more in control and comfortable, which will also help us to get the best out of you.
- Ensuring an interview panel that is representative of candidates.

We want the experience to be a pleasant one that you will reflect on positively regardless of the outcome. We very much look forward to reading about you, to get to know you further.

The key dates and steps are listed below:

- **Book a call with Asha, Head of Grants Operations** to learn more about the role.
- **Deadline for applications** – Sunday 18th August 2024
- **Invite candidates to interview** – By Thursday 22 August 2024
Please note only successful candidates will be contacted.
- **Opportunity for selected candidates to speak with a member of staff** – Week commencing 26 August 2024
- **Interviews** – Wednesday 4 September 2024

Good luck with your application!