

## JOB DESCRIPTION

**Job title:** Deputy Trust Executive

**Job purpose:** To work with and support the Director of The Linbury Trust and the Lead Trust Executive of The Headley Trust to enable the Trustees of the Linbury and the Headley Trusts to achieve their philanthropic ambitions and to deliver the Trusts' strategies and objectives through grant-making in their priority areas.

**Reports to:** Director, Linbury Trust and Lead Trust Executive, Headley Trust

**Responsible for:** NA

### Duties and key responsibilities

It is anticipated that time will initially be split between the Trusts as follows: 60% Linbury Trust / 40% Headley Trust. Subject to review and direction by Trustees based on Trust priorities.

The Deputy Trust Executive will be expected to progressively work towards increased autonomy, supporting and working with the Director and the Lead Trust Executive to:

- Ensure that all grant making activity is in keeping with the philanthropic vision, values, and ethos of the Trustees.
- Provide Trustees with expert professional advice and well-judged recommendations for grant-making, based on detailed knowledge of their sector and authoritative analysis of relevant charities.
- Cultivate a network of contacts with experience of working in the Trusts' priority areas.
- Review and evaluate progress of programmes and partnerships.
- Prepare proposals and reports for Trustee meetings and contribute to the minuting of Trustee meetings.
- Work closely with recipients of grants and programmatic investments to develop their capacity to achieve desired impacts (e.g., facilitating collaboration and the sharing of information between grantees, providing or facilitating organisational support and development) as well as ensuring funding conditions are met and payments are made in a timely manner.
- Support grantees in additional fundraising by appropriate introduction to other funders and identify opportunities to strengthen their work through collaboration with other partners.
- Provide Trustees with research, financial and narrative reports, and information on the Trust programmes including grants, investments and projects as requested.

- Deputise for the Director/Lead Executive at grantee information sharing events and network meetings when appropriate.
- Participate in the development of the Trusts' mission and strategic plan and support periodic reviews with trustees and the Director/Lead Trust Executive.
- Develop communication materials and website content for the Trusts in collaboration with Trustees, colleagues, and partners.
- Carry out research relevant to the Trusts' mission and priority areas.
- Draft internal reports on wider context for new funding areas for review by the Director/Lead Executive and/or Trustees.
- Work closely with other trust staff.

### **Grants Management**

- Assist in the management of day-to-day grant-making-funding operations to ensure a best practice approach end-to-end.
- Carry out thorough due diligence of applicants' work, achievements, and financial situation.
- Ensure effective grants administration including recording information for a robust and efficient audit trail, supervising the recording of grant information and preparation of grant award letters.
- Monitor the effectiveness of the Trusts' grants and investments through meetings, visits, reports, and regular communication.
- Write minutes and file notes to record Trustee decisions on new grants; amend (where necessary) and sign grant offer letters up to £50,000; liaise with Trust PA/Administrator to ensure that grant offers, correspondence and grantee reports are electronically filed for audit purposes.

### **Financial Management**

- Produce regular budget and management account reports.
- Make recommendations to the Director/Lead Trust Executive regarding improvements to finance systems or cost savings.
- Prepare reports on grants awarded for Trustees' meetings and the Trusts' Annual Reports.
- Liaise with Finance to approve payments to grantees in a timely manner; ensure grant offer conditions (e.g. safeguarding) are being met.
- Liaise with Finance team and other relevant SFCT colleagues to manage and monitor the Trusts' budgets and present updates and recommendations at regular Trustee meetings.

### **Engagement and partnerships**

- Deal tactfully and positively with partners and beneficiaries
- Build rapport with the Trustees, be willing to take direction from them and cede final decision-making to them.
- Represent the Linbury and Headley Trusts in public facing contexts when appropriate.

- Manage events, liaising with internal and external stakeholders.
- Facilitate and organise meetings as required between Trustees and prospective partners or grantees and ensure follow up communication.
- Build partnerships and funder collaborations to improve the efficacy of the Trusts’ priority areas and grant-making in the sector.
- Make constructive use of the freedom the Trusts have to innovate and experiment with new ideas and partnerships.

**Other responsibilities**

- Represent and be an ambassador for SFCT.
- Be proactive in keeping up to date with developments affecting the role and maintain and improve personal competence through continuous professional development.
- Be flexible and carry out other associated duties as may arise, develop, or be assigned in-line with the broad remit of the position.
- Work collaboratively with others in all aspects of SFCT’s work
- Ensure legal compliance.
- Ensure compliance with data protection regulations.
- Support and promote diversity and equality of opportunity in the workplace.

**Scope & Accountability**

<b>Decision making and limits of authority</b>	<ul style="list-style-type: none"> <li>• Identification and selection of proposals to present to Trustees for final decision referring to Director/Lead Trust Executive as necessary.</li> <li>• Management of grants including liaison with grantees and between grantees and trustees</li> <li>• Manage and monitor the Trusts’ overall budget, ensuring risks are raised with Director/Lead Trust Executive/Trustees as necessary.</li> <li>• Deputise for Director/Lead Trust Executive in SFCT wide and external commitments where appropriate.</li> </ul>
<b>Financial resources</b>	<ul style="list-style-type: none"> <li>• Authorisation of trustee-approved grants or invoice payments up to £50,000</li> <li>• Managing budgets for specific projects or initiatives.</li> </ul>
<b>Information resources</b>	<ul style="list-style-type: none"> <li>• Responsible for ensuring contacts database, web or social media content are maintained for production of publications.</li> <li>• Manage grants database, ensuring quality data in line with the Trusts’ governance, accountability and</li> </ul>

	<p>due diligence standards and its commitment to Diversity, Equity and Inclusion in its grant making.</p> <ul style="list-style-type: none"> <li>• Draft, update, and maintain policies on privacy, safeguarding etc. in liaison with relevant SFCT colleagues/teams</li> <li>• Implement and amend systems and databases as appropriate.</li> <li>• Maintaining budget, finance, and expenses records</li> <li>• Preparing and logging topical and organisational research papers</li> </ul>
<b>Other resources</b>	
<b>People management</b>	<ul style="list-style-type: none"> <li>• No direct management of staff but may support Director/Lead Trust Executive in delegating and supervising tasks to and providing support for PA/Administrator/other staff as appropriate.</li> </ul>
<b>Legal, regulatory and compliance</b>	<ul style="list-style-type: none"> <li>• Requires compliance with data protection regulations.</li> <li>• Ensure compliance with SFCT Safeguarding policies and procedures and data protection in relation to grant management.</li> <li>• Ensure compliance with SFCT health and safety procedures. Equal Opportunities and Diversity policies and procedures.</li> </ul>

## PERSON SPECIFICATION

### EXPERIENCE

- Experience and understanding of working in areas of activity relevant to the Trusts' work.
- Management of grant programmes with diverse range and type of grantees to achieve strategic charitable goals.
- Experience of building and managing relationships with a range of stakeholders including other funders, expert advisors, NGOs and grantees, to support effective grant-making programmes.
- Strong research skills based on knowledge of the charity sector and current issues.

## **SKILLS AND ABILITIES**

- Excellent written communication skills with proven ability to present ideas skilfully, in writing and in person.
- Ability to build rapport with trustees and communicate with people at different levels of seniority.
- Ability to form collaborative working relationships with colleagues.
- Able to learn from / interpret new research and other resources that are relevant to the trust's priority areas.
- Proficiency with Microsoft Office and experience of using a database.
- Experience of budgets and financial management.
- Ability to successfully plan and manage a substantial administrative workload, operating in a rigorous and efficient way, with careful attention to detail.
- Ability to undertake research and use analytical skills to summarise complete data.
- Ability to effectively prioritise work with and across Trusts.
- Confident to take the initiative and work independently.
- Deal tactfully and positively with the Trusts' beneficiaries.

## **KNOWLEDGE AND EDUCATION/TRAINING**

- Knowledge and understanding of the Trusts' priority areas and the ability to cultivate a network of contacts with experience of working in the Trust's priority areas.
- An understanding of how charities work, including their financial and governance arrangements.
- Stakeholder engagement and management processes and tools.
- Understanding of the process of carrying out due diligence review of charitable organisations including finance, governance, and operational models.

## **PERSONAL ATTRIBUTES AND OTHER REQUIREMENTS**

- Whole-hearted support for the family's realisation of its philanthropy, and commitment to the Trustees' objectives and grant-making priorities
- Able to work flexibly and out of hours from time to time, as required. Some UK travel may be required.
- Active and self-led learner who takes ownership of their learning.
- Finds working in a complex and diverse environment rewarding.
- Skilled at working collaboratively across diverse groups with varied agendas and perspectives.
- Good judgement, discretion, and discernment.
- Ability to adapt dynamically to the evolving priorities of the Trust.
- Commitment to anti-discriminatory practice and equal opportunities. An ability to apply awareness of diversity issues to all areas of work.