

**AGENDA FOR CHANGE
NHS JOB EVALUATION SCHEME**



JOB DESCRIPTION

1. JOB IDENTIFICATION

Job Title:	Grants Officer
Reports to:	Charity Lead Officer
Department, Ward, or Section:	Financial Services
Operational unit/Corporate Department:	Finance
Job Code:	CSFINCASSHACCT77
No of Job Holders:	1
Date:	25 September 2024

2. JOB PURPOSE

The post holder is responsible for the full range of grant funding duties to support and promote the Highland Health Board Endowment Fund Charity, NHS Highland's official Charity.

Be the first point of contact for staff enquiring about accessing charitable funds to deliver projects that enhance experiences for patients, staff, and our wider community.

Provide support and assistance to the Charity Lead Officer to identify and deliver projects that will support the Charity to achieve its grant-making objectives.

Provide advice and guidance to internal and external stakeholders in all aspects of the Charitable Grant Services functions.

Investigate enquiries from staff/communities regarding Grants and provide advice and assistance as required.

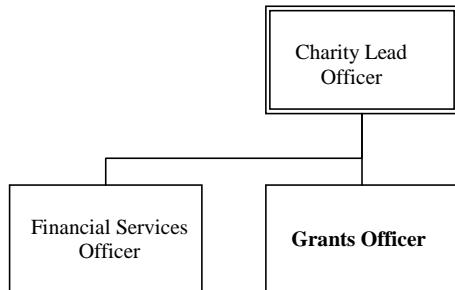
Ensure that processes are undertaken in compliance with the Charity's policy and procedures and other OSCR/Statutory requirements.

Ensure that the workload is completed accurately and in line with financial timescales to enable NHS Highland's Charity to report on its financial performance and to contribute to the production of the statutory accounts.

3. DIMENSIONS

The Highland Health Board Endowment Fund Charity is currently valued at approximately £10m and comprises over 300 individual funds. Annual investment income is approximately £260k and donations and legacies amount to over £1million per year. Providing information - financial and non-financial advice to applicants on all aspects of endowment funds will be a key part of this role.

4. ORGANISATIONAL POSITION



5. ROLE OF DEPARTMENT OR SECTION

The Highland Health Board Endowment Funds is a registered charity (SC016791) which is regulated by the Office of Scottish Charity Regulators (OSCR). The NHS Highland Non-Core Finance team provides a comprehensive endowment management and administration service to the Highland Health Board Endowment Fund. Specifically:

- Guide and support the Highland Health Board Endowment Funds trustees to meet regulatory requirements of OSCR.
- Provide to the Trustees the financial information required for effective and appropriate decision making, procuring expert advice and guidance where necessary.
- Provide to the Highland Health Board Endowment Funds a comprehensive fund management and administration service.
- Provide to the Fund Managers a quality fund management, guidance, and administration service.
- Provide a quality grant pathway from initial enquiry to file closure.

6. MAIN TASKS, DUTIES AND RESPONSIBILITIES

Support the management of the grant-making email inbox, responding to queries and processing of applications.

To support the delivery of projects and provide advice on budgeting.

To support the Charity Lead Officer and other relevant Charity staff to ensure the delivery of projects, within budget.

Working closely with the Finance business partners to oversee project delivery and respond to complex questions around access to funds and amount(s) available.

Support colleagues in the Charity team to produce fund management materials, including bespoke reports, case studies and periodic publications, such as the Charities annual impact report.

Ensure compliance with all OSCR relevant legislation including the Charities Act and GDPR.

To work with the wider Team to share and promote grant-making activities and opportunities.

Provide ad-hoc and scheduled reports, about projects and spending activity.

To take on ad hoc tasks at the discretion of the Charity Lead Officer to support the work of the Charity more broadly.

To support stakeholder analysis to ensure key audiences are identified and engaged with appropriately and consistently to ensure identified projects will have appropriate input and support.

Work collaboratively internally and externally to support engagement through other programmes, avoiding duplication and maximising links and connections with other work.

To support Highland Health Board Endowment Fund Charity values of quality, teamwork, care and compassion, dignity and respect, and openness, honesty, and responsibility through the application of appropriate behaviors and attitudes.

Interpretation and implementation of NHS Highland policies with regards to financial regularity, stewardship and Code of Conduct and to ensure compliance with Standing Orders, Standing Financial Procedures and Fraud Policy.

7. EQUIPMENT AND MACHINERY USED

Essential user of Personal Computer and networked systems within NHS Highland. Use of office equipment: PC, photocopier, printer/scanner, telephone. New equipment may be introduced as the organisation and technology develops; however, training will be provided.

The post holder is expected to use a full range of common IT office products, the post holder uses these systems to input large amounts of accurate data. This data is used by the Charity Lead Officer and colleagues to create, develop, and update reports for financial requirements on a frequent basis.

There is also a duty of care to report any faults detected within any of the systems used.

8. SYSTEMS

Frequent day-to-day user of MS Office suite of software including Word, Outlook, Excel, PowerPoint, Access, and Project. Use of the internet and social media for research and marketing purposes.

Use of Grant Management or CRM systems and digital design programs such as Canva.

New systems may be introduced as the organisation and technology develops; however, training will be provided.

9. ASSIGNMENT AND REVIEW OF WORK

The Charity Lead Officer will manage and support on a regular basis to review progress on the Charitable Fund grant programs and allocation and discuss issues that may arise.

Supporting the participation in continuing professional development.

10. DECISIONS AND JUDGEMENTS

The postholder is expected to work within the policies and procedures provided and their work will be managed rather than supervised.

The post-holder will work to a series of set timetables and will be expected to complete a range of specific tasks within certain deadlines. Within that framework, the post-holder will be expected to prioritise their own workload, be flexible and refer on a regular basis to more senior members of staff.

11. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB

Requirement to “multi-task” at busy times dealing with a range of complex queries and issues from Communities, Trustees, managers, and staff.

Prolonged periods of concentration to cope with complex information in a variety of formats.

Deal with emotional impact of applicants being refused funding and where funding ceases.

Speed and accuracy with keyboard skills.

Compliance with Health and Safety/risk management policies.

Compliance with manual handling regulations.

Long periods sitting continuously.

Mobility and ability to travel to attend meetings out with own building/area.

The need to treat much of the information provided and received in confidence.

Ability to manage time pressures during busy periods.

12. COMMUNICATIONS AND RELATIONSHIPS

The postholder is required to provide and receive routine and often sensitive financial information which requires the use of considerable interpersonal skills such as dealing with, for example, complaints about rejection of grant applications or negotiating compromise on grant proposals. This requires the postholder to have persuasive and negotiating skills to diffuse the situation and reach a satisfactory solution. Tact and discretion must also be used in what can become difficult situations and a sympathetic approach is also required when dealing with information such as personal difficulties.

The postholder will be required to communicate statutory financial regulations and NHS rules in a simplified manner to non-finance staff and customers.

Within Organisation:

Regular contact with finance colleagues who have responsibility for authorising invoices for payment.

Other members and departments of Financial Services, and senior managers within other departments of the Board, daily by face-to-face meetings, phone, and email.

External:

Discuss and resolve issues with customers, which may be contentious and sensitive.

It is essential to maintain these relationships to achieve key results.

13. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB

Physical:

Speed and accuracy with keyboard skills, input at a keyboard most of the day.

Compliance with Health and Safety/ risk management policies.

Compliance with manual handling regulations.

Long periods sitting continuously at a keyboard.

Light physical effort lifting and carrying files to and from shelves and into storage.

Yearly archiving of paperwork. Involves emptying lever arch files, preparing them for transport them to an off-site store.

Constant exposure to VDU.

Mental :

Long periods of concentration when inputting data coming from various sources within NHS Highland.

Ability to manage time pressures during busy periods.

Frequent requirement for concentration required when checking, reconciling, and analysing data during which the postholder may be required to switch tasks unpredictably.

Concentration required for answering queries from staff and customers.

Absorbing, retaining, and acting on large volumes of information.

Requirement for speed and accuracy.

Subject to interruptions when inputting data or other tasks.

Dealing diplomatically with challenging situations.

Adhering to strict deadlines.

Emotional:

Demands of dealing with applicants who may be abusive or aggressive. Required to diffuse the situation by remaining calm, yet assertive under pressure.

Dealing with customers either by telephone, email or letter or face to face who need to discuss sensitive and delicate matters. Required to be tactful and compassionate, whilst still ensuring all outstanding monies are recouped.

Dealing with the relatives of customers who are seriously ill or deceased.

14. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB

The postholder will be required to communicate statutory financial regulations and NHS rules in a simplified manner to non-NHS staff.

Knowledge and experience of funding programmes and grant administration.

Relevant experience dealing with projects in community settings and with a wide range of stakeholders.

Exceptional verbal and written communication skills to convey concepts and ideas coupled with training skills for techniques and methodologies for production of bids and running projects.

The post holder will be expected to have excellent presentation skills, including being able to present complex concepts in a straightforward and understandable fashion.

The post holder is expected to be able to analyse how projects are progressing and appropriately present results often in the face of scarce applicant resources.

Practical experience of the complexities involved within challenging communities and stakeholder groups.

Awareness of political sensitivities, and the ability to support organisational objectives through collaborative working.

Educated to HNC and/or have previous relevant experience working in communities.

Computer literacy is an essential skill as is the ability to work proficiently with a range of current computer office products.

An extensive knowledge of PC based applications (including Excel and Word) is essential to maintain and set up documents and spreadsheets.

Interpersonal and negotiating skills.

Knowledge of NHS Highland's Procedures and Policies.

15. JOB DESCRIPTION AGREEMENT

I agree that the above Job Description is an accurate reflection of my duties and responsibilities at the date of signing.

Job Holder's Signature:

Date:

Manager's Signature:

Date: