

JOB DESCRIPTION AND PERSON SPECIFICATION

Job Title:	Fund Engagement Manager
Reports to:	Head of Grants
Department:	Grants
Gross Salary:	£35,000 to £38,000
Hours	37.5
Job Type	Permanent

INTRODUCTION

St George's Hospital Charity oversees over 220 Special Purpose Funds (SPFs) with a total value of over £4.5m. These funds hold donor-gifted and community-fundraised income, each with a specific purpose to support a particular ward, department, area of research or group of staff or patients. Every SPF has designated Fund Advisers, who are St George's University Hospitals NHS Foundation Trust (the Trust) and/or St George's University staff members with delegated authority to review and authorise expenditure approvals and applications for funding. There are over 500 Fund Advisers who need effective stewardship as significant stakeholders.

The Fund Engagement Manager is dedicated to the management of the Charity's Special Purpose Fund (SPF) portfolio. These funds are key to the Charity's grant-giving and fundraising strategies, and the Fund Engagement Manager role is primarily focused on developing and achieving the targets in the SPF strategy, and delivering SPF management, engagement and comms. This is a cross-cutting role that requires ongoing collaboration across the Charity as well as with Trust and University staff of all levels.

ABOUT ST GEORGE'S HOSPITAL CHARITY

St. George's Hospital Charity, an NHS charity, supports St George's University Hospitals' Foundation Trust which via its St George's Hospital in Tooting and Queen Mary's Hospital in Roehampton, serves a large population across southwest London, extending support to tens of thousands of patients, staff, and community members. Our daily efforts significantly impact patients, their loved ones, and the dedicated healthcare professionals.

Presently, we contribute grants and generate funds exceeding £2 million annually. With an ambitious goal, we aim to double both our yearly fundraising and grant allocations to reach £4 million within the coming years.

ABOUT ST GEORGE'S NHS TRUST

St. George's University Hospitals NHS Foundation Trust stands as an exceptional institution, dedicated to patient care with a team of thousands tirelessly attending to patients' day and night. As one of the nation's largest teaching hospitals, it caters to a wide-ranging population of 1.3 million in southwest London and extends its specialised services, such as cardiothoracic medicine, neurosciences, and renal transplantation, covering an additional 3.5 million individuals in Surrey and Sussex.

To realise this commitment, a workforce of 9,000 operates tirelessly, ensuring top-tier patient care. St. George's serves as a pivotal teaching hospital, affiliated with St. George's University of London, hosting

around 5,000 students. This academic institution trains a diverse cadre of healthcare professionals from the local region and conducts cutting-edge medical research, yielding benefits to patients not only locally but also on a national and global scale.

ABOUT THE ROLE

Purpose of the role

To support senior management, the board of trustees and the wider team with the management and administration of the Charity's SPF's.

This role exists to further develop and deliver our SPF strategy, and to work with Fund Advisers and Trust senior management to establish and ensure that proper governance is followed, funds are spent according to guidelines, and opportunities for grant spending and fund growth are capitalised to further the funds' purposes.

Background to the role

This role was created to provide dedicated resource to optimise the efficiency of our SPF portfolio, and champion these SPFs both internally among the Charity's staff and externally within the Trust and University.

This is a role which must operate at a micro and macro level, paying attention to the detail of management, administration and systems but also with the ability to think strategically and make recommendations to senior management and trustees. The successful candidate will be highly organised and outgoing, with lots of initiative and the ability to reach out to people and build strong relationships.

You will be a key member of the Grants team and be managed by the Head of Grants, but you will also work closely with all charity teams given the nature of this all-encompassing role, including providing the crucial link between Grants and Fundraising.

MAIN DUTIES AND RESPONSIBILITIES

Main responsibilities – SPF Strategy

To implement and further develop the Charity's SPF Strategy and KPIs, working closely with the Head of Grants and making recommendations to trustees, including:

- Completing the Charity's fund reclassification project, while keeping re-classification guidelines under review, to ensure all existing SPFs are appropriately legally classified as restricted, designated or unrestricted in line with Charity Commission guidance, and that cross-Charity processes are established to ensure appropriate classification of all relevant donations moving forward.
- When all funds are appropriately classified, analysing the SPF portfolio and establishing and implementing strategies by classification type, to merge, close and repurpose inactive/unusable funds in line with Charity Commission guidance. This will revolutionise the SPF portfolio, allowing dormant funds to be unrestricted (where unnecessarily being held as such), re-invigorated, and re-used, creating much-needed new expenditure opportunities in line with donor wishes and to support Charity and Trust strategies. A rationalised SPF structure will be planned and implemented, working closely with senior leadership at the Trust and University (General Managers, Divisional Leads, Clinical Directors, research academics) to establish a portfolio that maximises income and expenditure and best supports their needs

- Following established processes which will be kept under review, rename funds where necessary, to ensure prospective donors and fund users, as well as internal Charity staff, are clear on how funds can be used.
- Regularly reviewing, updating and disseminating the Fund Adviser Handbook to ensure appropriate governance is established and followed in line with the Charity's policies and procedures and Charity Commission guidance.

Main responsibilities - SPF Management, Engagement and Communications

To ensure the effective management of and engagement with the Charity's SPFs, including:

- Managing and updating the SPF database on Access Financials, initiating new processes for the ongoing maintenance of Fund Adviser records and investigating fund history and details to ensure information is correct and up to date.
- Developing a Fund Adviser stewardship programme, including arranging relationship-building meetings with all Fund Advisers, developing and creating a range of dedicated Fund Adviser communications such as welcome packs, regular newsletters using MailChimp, and fund statements.
- Taking the lead on engagement activities to raise the profile and visibility of SPFs, ensuring effective collaboration with the Fundraising team to champion both spending and fundraising. This will include working alongside Trust and University staff at all levels to drive forward the efficient use of the SPF portfolio, seizing opportunities for regular meetings and PowerPoint presentations (including with 3 high-level Management Boards every quarter), providing dedicated marketing resources, creating charity and Trust comms for our website, the intranet, and newsletters, and supporting the cultivation of relationships with patients and industry to capitalise and secure income opportunities.
- Constant analysis of the funds, pulling systems reports to monitor fundraising and expenditure and focusing dedicated engagement with those not meeting targets, working with relevant stakeholders to create and manage spending and income plans.
- Compiling and presenting regular management reports to the charity's Trustee Board as well as sub-committees.
- Managing all SPF-related correspondence in the Grants team inbox.

Main responsibilities - Financials

- Develop in-depth systems knowledge of grants and funds configuration within the Charity's financial database (Access Financials) and be the Grants Team lead in the compilation of fund summary reports using Access Financials.
- Responsibility for final approval of all SPF expenses claims from Trust/University staff, providing financial oversight to ensure all claims are evidenced, meet Charity guidelines, and use appropriate coding, with final sign-off before payment. This role acts as the first point-of-call for expenses-related support, providing troubleshooting and guidance for users, requiring proficiency using Access Workspace Expenses Module.

Main responsibilities – Collaboration

This is a cross-cutting role collaborating within the Grants team and across Charity teams, including:

- Working closely with the Grants Officer on SPF grant applications by playing a key role in developing applications with grant applicants to ensure a pipeline of grant applications to meet the annual grants budget.
- Working closely with the Grants Officer on supporting procurement and expenditure processes relating to SPF grant awards.
- Supporting the ongoing development and implementation of Grants team processes as necessary.
- Providing the central link between the Grants and Fundraising teams, to oversee the management of donor funds within SPFs and to support income generation. This includes: collaborating with all Managers and Senior Managers to champion and support SPF fundraising activity and income prospects, developing and implementing ways to work closely to guide new donations and income possibilities based on relationships with Fund Advisers, significant clinicians, and corporate/industry contacts; leading investigations into and advising on allowable income; identifying the most appropriate SPFs for expected donations; advising on the ongoing development of the new CRM system Raiser's Edge regarding fund income and reporting; providing fund activity updates for donors; and ensuring high-profile donations are spent, working closely with Fund Advisers and relevant Trust staff.
- Working closely with the Finance team to improve internal processes for expenses payments and fund management.

THE PERSON

We are looking for a person who has strong experience of grant-giving. In that role they also need to demonstrate experience of having worked solidly with fundraising and communications and marketing, as well as proficiency with financial systems and affinity for IT.

Experience

- Experience of grants management, from pre-award to post-award, including advising applicants, assessing and monitoring grants, and financial oversight (E)
- Proven experience of developing and implementing new grant-giving processes (E)
- Experience of developing grant comms and resources for external audiences, communicating complex information in easily accessible and compelling ways (E)
- Proven success developing relationships with key internal and external stakeholders, including those at a senior level (E)
- Experience of working in partnership across internal teams, including with Directors and Senior Managers, and developing processes to ensure appropriate collaboration (E)
- Experience developing and implementing grant-giving strategy targets (E)

- Proficiency using financial databases and the ability to take the lead contributing to the development of new business management software systems and processes, including working with external consultants (E)
- Experience of reporting and making recommendations to trustees (E)
- Knowledge and experience of funds/grants management and fundraising activities within the charity/health sector (D)
- Experience using Access financial software including Financials, FinOps and Workspace Expenses Module (D)
- Experience using Raiser's Edge CRM and MailChimp (D)
- Sound knowledge of relevant charity legislation and best practice (D)
- Experience of working with fundraising initiatives (D)
- Experience of online grants management systems (D)
- Experience/knowledge of the NHS charity landscape (D)
- Experience of health-related organisations (D)

Skills, knowledge, and ability

Essential

- High level of accuracy and attention to detail
- Strong ability to use technology in all aspects of work, including designing resources, with a high proficiency in Microsoft Office programs (Word, Excel, PowerPoint, Outlook), internet browsers and web-based systems, CRM databases
- Excellent communication skills, both written and verbal
- Excellent interpersonal skills and ability to build a strong rapport with colleagues, fund advisers and grant holders
- Commitment to collaborative teamwork and inclusive working, ensuring quality and valuing diversity
- Ability to give and receive feedback objectively and sensitively and willingness to challenge constructively
- Proven ability to influence stakeholders at all levels and present complex information
- Confidence in presenting publicly at conferences, events and workshops to a range of audience types and sizes.

Personal

Essential

- High standards of personal conduct, honesty, and integrity.
- Ability to establish good working relationships.
- Ability to work under own initiative and operate a flexible approach.
- Collaborative and inclusive, prepared to work as part of a wider team in contributing specific expertise.
- Committed to awareness of issues of equality and cultural diversity.

- Ability and motivation to deliver high-quality work with minimum supervision.
- Highly organised with the ability to multi-task.
- Flexible approach to managing and prioritising a high workload.
- Confidence in dealing with multiple stakeholders and competing priorities.
- A clear thinker who is proactive and solutions focused.
- Systematic approach to work, seeking to improve systems, processes, and information.

Other requirements

Essential

- Commitment to the values and principles of the NHS.
- Ability to travel between our hospital sites in southwest London as and when required though this is not frequent.
- Ability to handle confidential and sensitive information.
- Ability to work flexibly to cover other tasks within the team in times of absence.
- No envisaged barriers to obtaining standard DBS disclosure.