

Strategy, Policy & Insights Manager

POSITION DESCRIPTION

Reports to: Chief Executive Officer
Location: Invercargill
Scope: Full time 40 hours per week
Date: November 2023

OUR ORGANISATION

Community Trust South – Te Pou Arataki Pounamu o Murihiku (The stanchion that all pathways in Murihiku lead to where people obtain the treasures that enable them to fulfill their aspirations) – is a philanthropic funder providing support across the south including the Murihiku/Southland, Whakatipu, Tapanui and Heriot areas. Community Trust South (CTS) is the guardian of a community endowment. We help a wide range of groups and people here in the south every year by distributing millions of dollars in grants, scholarships and community loans.

Our Vision

A Thriving South, to achieve our aspiration we will:

- Demonstrate commitment to and understanding of Te Tiriti o Waitangi principles
- Protect and grow our investment fund for the benefit of our community and future generations
- Engage in effective and innovative philanthropy and grantmaking

Our Values

Manaakitanga/Respect	Tūhonono/Proactive
Tikanga/Integrity	Whanaungatanga/Approachable
Kotahitanga/Connected	Kaitiakitanga/Responsible

POSITION PURPOSE

The purpose of the role is to:

- Provide or develop insights which assist the Trust to better understand communities (of place and interest) and strategic drivers of the Trust's rohe (region), in order that the Trust's operations closely match the needs and aspirations of communities and key stakeholders;
- Help shape the development, implementation and monitoring of the Trust's strategic direction;
- Establish and maintain effective, positive and quality working relationships internally and externally with key stakeholders.
- Ensure the Trust has relevant, up to date and documented policy;
- Support the Trust to develop and advance its climate change commitment;
- Assist the Trust to better understand the impact of its grantmaking through monitoring, evaluation and learning insights;
- Undertake system administration for the Trust's grant management system.

KEY RESPONSIBILITIES

1. Research, Knowledge & Insights Management

- Proactively gather information and data, including on emerging issues and opportunities to inform the Trust's strategic direction, policies, and grantmaking.
- Respond to information needs of staff and as directed by the CEO to Trustee information needs.
- Maintain and share knowledge of best practice in philanthropy and grantmaking.
- Design, execute and/or manage Trust research/insights initiatives and projects.
- Ensure staff and Trustees are kept aware of key areas of interest for the Trust to promote and enable well informed grantmaking.
- Maintain high levels of philanthropy, grantmaking and community sector knowledge, through engaging and participating in relevant networks and forums.
- Maintain awareness of local authority, economic development agencies, peak bodies and other partners strategic, long term and annual plans, and provide advice as to the implications for the Trust's strategic direction and grantmaking.
- Monitor government (central and local) policy within the pou (pillars) and identified priorities and outcomes of the Trust and provide advice as to the implications for the Trust's strategic direction and grantmaking.
- Assess identified priority areas for the Trust's grantmaking and provide advice as to how the Trust's grantmaking might most appropriately be directed towards those areas.
- Maintain and build networks in relevant sectors, with community organisations and with other funders, locally and nationally.
- Consult and engage with representative communities of place or interest to better understand needs and issues to help inform the Trust.

2. Strategy

- Support the CEO in identifying strategic partners and opportunities for the Trust.
- Help shape and contribute to the development, implementation, monitoring, and review of the Trust's strategic vision and planning.
- Support development of strategic initiatives.
- Provide reports and respond to enquiries as required.

3. Policy

- Provide quality policy identification, analysis and advice and make recommendations on new policies and policy removal.
- Ensure the implications of the Trust's Te Tiriti o Waitangi (Treaty of Waitangi) and Climate Action commitments and other identified priorities of the Trust are considered in policy.
- Research and develop governance, investment, audit, finance, and risk management, operational, grants and scholarship policy in conjunction with staff, the CEO and Trustees.
- Monitor, maintain and update Trust policies as per policy schedule or as required in conjunction with Trustees, CEO and Grants Manager.

4. Analysis and Impact Reporting

- Maintain awareness of developments in outcomes and impact reporting and evaluation in the philanthropic sector.
- Develop, implement and support embedding of the Trust's monitoring, evaluation and learning framework (MEL).

- Create and implement effective organisational tools for monitoring, evaluating and communicating the impact of the Trust's work.
- Lead activity to collect, analyse and report on the Trust's activities and the impact of grants.
- Support annual auditing, annual reporting and statement of service performance reporting by preparing and providing data.
- Develop and maintain a reporting framework to guide decision making and strategic planning.
- Support staff and share knowledge about outcomes, impact, monitoring, evaluation and learning.
- Work closely with grants staff to incorporate monitoring, evaluation and learning into grants programmes.

5. Climate

- Provide strategic advice and coordinate the ongoing development of the Trust's overarching Climate Action Strategic Policy, and Action plans including assisting:
 - o The CEO and staff in developing their understanding of climate change and operationalizing the Trust's commitment.
 - o The Board and committees of the Trust in developing their understanding of climate change action and development of action plans.
- Communicate, engage, consult, and liaise with relevant networks, including the Combined Trust's Climate Action Working Group, and key stakeholders in support of the Trust's climate commitment.
- Support the annual reporting of the Trust's Climate Action commitment and progress against the Aotearoa Funders Commitment on Climate Action.

6. Grants System Management

- Undertake system administration for the Trust's grants management system.
- Proactively contribute to the development and continuous improvement of the Trust's grants management system to support efficient and effective granting, monitoring, evaluation, learning and reporting.
- Provide support, advice and training to staff, and where required Trustees, applicants and grantees on the grants management system existing functionality and new features.
- Proactively identify to the system provider grants management system improvements.
- Work with staff to ensure accuracy and integrity of data in the grants management system.
- Develop systems and processes for the Trust to easily access and use data from the grants management system to improve existing practice and to inform decision making, policy development and strategic planning.
- Manage major grants management system service issues.
- Collect, analyse and present grants management system data to support the Trust's monitoring, evaluation and learning framework and other reporting requirements.

7. Health and Safety

- Fulfil obligations under the Health and Safety at Work Act 2015 by complying with the Trust's health and safety policies and procedures.
- Take reasonable care to look after their own health and safety, fitness for work, and the health and safety of others.
- Ensure that no action or inaction on their part results in injury or illness to either themselves or to others.
- Identify and notify all hazards.

- Report all accidents, incidents, near misses and hazards to the Manager immediately.
- Use personal protective equipment and clothing supplied for all work that requires it.

8. Other Duties and Projects

- Other projects as they arise and as agreed with the CEO.
- Assist with providing coverage for other staff.
- From time to time undertake duties in addition to those outlined but which fall within your capabilities and experience.

KEY RELATIONSHIPS

INTERNAL	EXTERNAL
Chief Executive Officer	Key local, regional and national organisations
All staff	Stakeholders including local government, government agencies, sector peak bodies and community organisations
Trustees	Philanthropic organisations including other community trusts, local funders and relevant national funders
External Committee Members	Combined Community Trust Climate Action Leads
Contractors	Grants Management System Provider
	Research and Insights Entities

KNOWLEDGE, SKILLS AND EXPERIENCE

- Affinity with Community Trust South's values and Strategic Vision
- Commitment to and skill in working in ways which honour the principles of Te Tiriti o Waitangi
- Understanding and knowledge of tikanga Māori
- Experience in building relationships at all levels with a wide range of stakeholders
- Understanding of the charitable sector, community issues and the not-for-profit environment
- Experience working collaboratively in a team with excellent interpersonal skills
- Experience in working with a diverse range of community groups
- Excellent oral and written communications skills
- A tertiary qualification is desirable, but not essential
- Work experience in relevant roles
- Demonstrated ability to think strategically
- Excellent analytical and research/insights skills
- Strong organisational skills with ability to plan, prioritise and manage competing deadlines
- Advanced IT skills with experience in database management and proficiency in using MS Office tools and in particular Excel
- A clean full drivers' licence