

Funding Advisor

POSITION DESCRIPTION

Reports to: Grants Manager and Chief Executive Officer
Location: Invercargill
Date: July 2026
Hours: 15 hours per week

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 Aspiration

Our aspiration is for a Thriving South, our purpose is empowering communities to fulfil their aspirations.

Our Values

Manaakitanga/Respect

Tikanga/Integrity

Kotahitanga/Connected

Tūhonono/Proactive

Whanaungatanga/Approachable

Kaitiakitanga/Responsible

POSITION PURPOSE

The purpose of the role is to assist the Grants Manager with the administration of the Trust's Grants and Scholarship programmes.

KEY RESPONSIBILITIES

- Develop and maintain effective, ongoing relationships with community groups, grant seekers, and grant and scholarship recipients.
- Provide timely support for grant and scholarship enquiries, by phone or in person, including guidance on CTS' Strategic Aspiration, eligibility criteria, and application processes.

- Assist applicants to navigate and complete applications within the grants management system, by phone or in person.
- Conduct initial reviews of applications to ensure they meet eligibility requirements and include all required documentation (e.g. financial statements, AGM minutes, verified bank details).
- Assess grant and scholarship applications as directed by the Grants Manager.
- Prepare and submit recommendations through the grants management system to the Grants Manager and Chief Executive Officer, including proposed funding conditions and payment methods.
- Update the grants management system following Board decisions, ensuring accurate recording of conditions and future funding commitments.
- Attach appropriate acquittal forms to approved grants and scholarships within the system.
- Support the Grants Manager in preparing and distributing approval letters and associated documentation, ensuring all conditions and payment details are communicated.
- Prepare and distribute a summary of granting decisions after each Board meeting to Grants Manager and Marketing and Communications Advisor.
- Coordinate the grant payment process by monitoring payment requests, ensuring compliance with funding conditions, prepare weekly payment schedule for Grants Manager.
- Monitor outstanding acquittals and follow up on overdue documentation.
- Track unsubmitted applications and follow up with applicants as required.
- Monitor grants and scholarships that have not been uplifted by their due date and follow up with organisations.
- Identify grants and scholarships for potential write-off and escalate to the Grants Manager.
- Coordinate the Principals' Discretionary Funding Programme.
- Conduct audits of RSO application numbers.
- Contribute to special projects and other duties as required.

Health and Safety

- Take reasonable care of your own health and safety and reasonable care that others are not harmed by something you do or don't do. Follow any reasonable instructions given to you, and cooperate with any reasonable health and safety policy and procedure

Other duties as directed and agreed with the Grants Manager and/or Chief Executive Officer.

KEY RELATIONSHIPS

INTERNAL	EXTERNAL
Chief Executive Officer	Stakeholders including community organisations
All staff	Philanthropic organisations including other community trusts & local funders and relevant national funders
Trustees	
Grants Manager	

KEY SKILLS, QUALIFICATIONS AND ATTRIBUTES

The role of Funding Advisor requires a person with the following skills:

- A passion for people and the community
- Good listening skills
- An interpersonal style that is open and warm and someone who enjoys working collaboratively with others
- Takes accountability for the work they deliver and thrives in an environment that encourages team work and a sense of purpose
- Communicates effectively, both orally and in writing for a wide range of audiences
- Strong administrative skills, experienced and comfortable working with databases, report writing, and proficient in MS Office (Word, Excel, Outlook, PowerPoint)
- An understanding of financial statements
- Capable of building a network of strong working relationships
- Flexibility and adaptability in the workplace
- High levels of personal and professional integrity
- Live the Trust Values
- Holds a clean full Driver's license