

Funding and Compliance Officer



**LLOYDS BANK
FOUNDATION**
ENGLAND & WALES

Welcome!

Thank you for your interest in joining us as our **Funding and Compliance Officer**.

This is a genuinely exciting opportunity to be part of an independent charitable foundation with 40 years of impact. You'll be joining a driven and values-led team that is committed to connecting and catalysing community-led change. We're bold, relational, inclusive and can-do in everything we do. We're not afraid to innovate, take risks, and push for change that breaks down barriers and helps communities thrive.

As Funding and Compliance Officer, you will be managing grants from assessment through to completion. Working closely with applicants, grant holders, Lloyds Banking Group colleagues and consultants, you will help ensure compliance, oversee due diligence and contract management and maintain high standards of governance. We're looking for someone with grant management and safeguarding experience, strong judgement and attention to detail, as well as the ability to build effective relationships while improving processes and systems.

If you share our vision — that everyone in England and Wales should **be in a good place** — and you're ready to play your part, we'd love to hear from you.



About Us

Lloyds Bank Foundation for England and Wales is an independent charitable foundation, backed by Lloyds Banking Group and the people within it. We want everyone to be in a good place - personally, in a home that's a good place to live, and in a community that's a good place to belong.

We back people and communities across England and Wales, to make that happen, because when you back brilliant people, brilliant things happen. Our communities are full of ambitious, energetic and determined people stepping up to make their neighbours' lives better and their communities grow stronger. Day in, day out.

We play our role by connecting and catalysing community-led change, providing the money, time, tools and connections that build organisations' capacity and capability, to make people's lives better and their communities stronger.

You can find out more about us on [our website](#).



Voices in Exile



**LLOYDS BANK
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Our Values

Our values are more than words on piece of paper or stuck to the wall. Our values are how we live as we achieve our mission. They're how we work with our colleagues, our partners, and communities. Our values are at the heart of our organisation.

Bold

We're ambitious problem solvers.

Inclusive

We listen and learn from others.

Relational

We build relationships to achieve changes in society

Can do

We're driven and make change happen.



**LLOYDS BANK
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Our Impact

We've had 40 years of impact that lasts.

We've helped household name charities like Childline and Changing Faces get off the ground. As a frontrunner in organisational development and capacity building, our expert investments in charities have helped them turbocharge their growth, create new jobs, and become more resilient. And in our priority communities, we've improve how things work for people and places, so everyone can flourish.

Nearly

£1 billion

invested in communities

45,000

grants to community organisations

1,000s

of colleagues supported to give time and money

Nearly

1,700

jobs created over 10years



When I was referred to Youth Shedz, my mental health was awful and I wasn't leaving the house. I was really struggling with life. **I just wasn't in a good place.**

Having that space at Youth Shedz where I could just be myself and learn who I was, and what was really important to me, was so helpful. And then I started volunteering, and then I got offered a job and now I've been working here for three years.

Sonia, Assistant Youth Shedz Coordinator



Our Team

Lloyds Bank Foundation is an organisation with a bold vision, that's ready to scale.

Hand in hand with Lloyds Banking Group Group, and with partners new and old, we're setting out some ambitious goals, and each one of our four directorates plays a distinct role in making those goals a reality, so everyone in England and Wales can be in a good place.

Our Community-led Change Directorate is the delivery engine where strategy becomes action, with local teams embedded across England and Wales building genuine relationships with the people and places we support. Our Strategy, Impact and Innovation Directorate drives our national strategy, and connects what we learn on the ground to the systems change we pursue at a national level. Underpinning all of this are our Income and Operations teams, whose work ensures the organisation is sustainable, well-run and that our values are reflected in how we operate internally as much as externally.

We are governed by an impressive Board of Trustees who bring a wide range of skills and experience. We're a team of people who believe in what they do, support one another, and hold themselves to high standards.

You can meet our team and learn more about them [here](#).

Working with Us

Joining Lloyds Bank Foundation means becoming part of a team where your work directly contributes to making England and Wales a good place, whatever your role. The Foundation can offer you a rewarding career that supports your professional development alongside supporting community-led organisations, and creating a positive impact in society.

Everyone should be in a good place, and that's also true when it comes to working with us. We believe that we are at our best when we can be ourselves – that's why we are committed to creating an inclusive and accessible working environment for everyone.

92%

of our team describe themselves as either 'hopeful' or 'energised' by our new strategy.

We're a Disability Confident employer, a Living Wage Employer, and we work hard to make sure every member of our team feels valued, supported and able to thrive. We offer a comprehensive benefits package, and a culture built on our values. We welcome people of all backgrounds, particularly those from communities that are underrepresented in our sector. Whoever you are and wherever you're coming from, we want you to **be in a good place** when working with us.



Since joining the Foundation as a 2027 Associate, the opportunity that was presented to me to get a real insight into the UK voluntary sector in general and grant making in particular was remarkable.

I am so proud to be a member of the team, and play my part in the drive to better support and develop the capacity of small charities to address the issue of social injustice. I hope to further progress my career in the sector, and I feel I am at the right place.

Nebiat Tefera Abebe, Funding and Compliance Officer



Staff Benefits

We want everyone who works at Lloyds Bank Foundation to be in a good place, and that means making sure you have everything you need to thrive at work. Here's some of what we offer:

Generous annual leave of 33 to 38 days (inc. statutory)

Winter closure (additional 2-3 days)

Pension scheme with up to 13% employer contribution

Private medical insurance covering dental, eyecare and mental health

Two paid volunteering days per year

Employee family leave entitlement

Employee Assistance Programme

You can find more information about working with us and our comprehensive benefits package [here](#)



The Operations Directorate

The Operations Directorate is a key partner to the rest of the organisation in delivering "Everyone in a Good Place". Without strong systems, sustainable finances and a well-supported team, none of our work with charities would be possible.

The Directorate brings together four closely connected teams. Our People and Culture team supports colleagues to do their best work — recruiting well, developing our people, and ensuring our values are at the centre of how we work. Our Finance team ensures the Foundation is financially sustainable, with robust financial controls in place, managing resources carefully and making sure they are used effectively to back people and communities stepping up to make their neighbours' lives better.

Our Technology and Compliance team keeps our systems running, and our data safe, and supports our grant management, delivering the platforms and processes that connect us to the charities and communities we support. Our Portfolio Management and Governance team underpins strong charitable governance, providing oversight and assurance, tracking progress against plans, managing risk, and ensuring the Foundation meets its legal, regulatory and charitable obligations.

We work closely with the Community-led Change, Strategy, Impact and Innovation and Income Directorates to ensure delivery, influence and resource mobilisation reinforce each other. Together, we make sure the Foundation is well-run, well-resourced and in a good place to support the communities, charities and people who need us most.



WODIN (Women and Digital Inclusion)

About the role

Role: Funding and Compliance Officer

Starting Salary: £42,298

Contract: Full-time, permanent contract (we are open to conversations about different ways of working - so please ask)

Location: London-based role with expectation of hybrid working from our London office (Society Building, All Saints Street)

Line Manager: Funding and Compliance Lead

Role purpose

As Funding and Compliance Officer, you will assess funding applications and manage the funding lifecycle from approval through to completion. You will support the Foundation's funding and compliance activities, including grant assessment, due diligence, contract management and the oversight of donated funds. Working closely with applicants, grant holders, Lloyds Banking Group colleagues and consultants, you will help ensure compliance and contribute to the integrity of the Foundation's data and processes.

As the operating environment for charities becomes increasingly complex and as the Foundation seeks to diversify its income and funding sources, effective compliance and risk management are becoming increasingly important. You will play a key role in ensuring funding and income activities align with regulatory requirements. You will be well versed in Charity Commission guidance as well as our internal policies. Through your work, you will help to protect the Foundation's reputation and maintain high standards of governance, and you will also lead on safeguarding and the risk register.

You will enjoy this role if you thrive on a mix of detailed, process-driven administrative compliance work, as well as opportunities to engage with others, contribute ideas and confidently present your views.

Key Responsibilities

Funding and Grant Management

- Assess funding applications against agreed criteria, undertaking due diligence reviews, engaging with applicants, and presenting funding recommendations to Foundation representatives.
- Provide high-quality applicant support throughout the funding process, including pre-application guidance, webinars, calls, and feedback to unsuccessful applicants.
- Manage funding administration from approval through to completion, including maintaining accurate Salesforce records, issuing funding offers and processing grant payments, and managing supplier and consultant invoices.
- Assess and process claims under the Foundation's Matched Giving Programme, working with Lloyds Banking Group colleagues and nominated charities.
- Contribute to the development of funding strategy, priorities, and grant-making criteria by sharing insights from assessments and participating in working groups.
- Use feedback from applicants and grant holders to improve guidance, communications, and funding processes.
- Work collaboratively across the Community-Led Change Directorate and wider Foundation to support effective grant management processes and organisational priorities, including funding, communities, and influencing work.

Funding and Grant Management (cont'd)

- Act as a key point of contact for applicants, grant holders, members of the public, Lloyds Banking Group colleagues and organisational development partners, providing high-quality relationship management, responding to enquiries, supporting service improvements, and working with Community Impact Managers to coordinate partner onboarding, process improvements and invoicing activities.
- Produce and analyse Salesforce data to support funding reviews, learning, and continuous improvement.

Compliance and Legal

- Assess grant applicants against legal, regulatory, and internal requirements, including organisational governance, conflicts of interest, safeguarding, and due diligence standards.
- Work closely with funding teams across the Foundation to ensure compliance with internal policies, financial controls, and grant management processes, including the accurate recording of grants on Salesforce.
- Support data integrity and compliance with internal data policies and GDPR requirements.
- Maintain the organisational contract register and support effective contract management, working with colleagues across the Foundation and the Finance team to ensure robust governance, financial processes, compliance, and clear audit trails.

Responsibilities (continued...)

Safeguarding and Risk Register

- Support the Director of Community-Led Change and the Head of Technology and Compliance in maintaining and developing safeguarding processes, procedures, and training, ensuring they remain effective and up to date.
- Support the response to safeguarding incidents in line with Foundation procedures, working with the Director of Community-Led Change and the Head of Technology and Compliance as required.
- Work closely with the COO to maintain the Foundation's risk register, ensuring directorates regularly review and update their risks and that risk assessments are appropriately evidenced and recorded.

Ways of Working and Contribution

- Act as an ambassador for the Foundation, representing our work and values with credibility and professionalism internally and externally.
- Live and champion our values, being bold, inclusive, relational and can-do in how you approach your work and relationships.
- Collaborate across teams and directorates, contributing to a joined-up and supportive organisational culture.
- Contribute to organisational priorities and activities, including all-Foundation events, cross-team projects and key initiatives.
- Engage in learning and development, taking responsibility for your own growth and contributing to a culture of continuous improvement.
- Work flexibly to meet the needs of the role, including occasional travel, out-of-hours activity and overnight stays where required.

Key Relationships

- **Internal:** Funding and Compliance Lead, Head of Technology and Compliance; Community Led Change Directorate; Operations Directorate colleagues; Finance team; Senior Leadership Team; wider Foundation colleagues.
- **External:** Applicants and funded partners; external assessors; auditors and regulatory bodies; sector networks and grant making peers; delivery partners and intermediaries.

What Success Looks Like

- High-quality funding assessments, applying criteria consistently, exercising sound judgement and providing a positive experience for applicants.
- Compliance, safeguarding and governance risks are managed effectively, maintaining robust controls and taking timely action to address issues.
- Data is accurate and reliable and Salesforce records, reporting and compliance activities meet organisational standards.
- There are strong relationships with applicants, grant holders, Lloyds Banking Group colleagues and partners, providing a responsive and professional service.
- Feedback, data, and frontline insight is used to enhance processes.

This is not an exhaustive list and other duties may be reasonably required.

About you

Experience & Qualifications

- Experience of grant making and/or grant management including some elements of assessment, compliance, contract management and reporting. This should include significant experience of safeguarding within grant making.
- Experience of improving and implementing operational processes and systems to enhance efficiency and effectiveness.
- Experience of assessing information, applying criteria consistently and using sound judgement to make decisions.
- Experience of working with CRMs preferably Salesforce.
- Understanding of the UK charity and social enterprise sector.

Knowledge & Skills

- Excellent communication skills, including the ability to present ideas and judgements clearly and confidently.
- Good knowledge of grant management processes and compliance requirements, with the ability to apply these consistently.
- Strong relationship management skills, with the ability to build effective working relationships internally and externally.
- Excellent organisational and prioritisation skills, with the ability to manage a varied workload, work independently and meet competing deadlines.
- Strong analytical skills and attention to detail.
- Excellent IT skills, with the ability to learn and adapt to new systems and software quickly.

Values & Attitudes

- Demonstrates a strong sense of ownership and accountability, taking responsibility for delivering high-quality work and following through on commitments.
- A collaborative and relational style - able to build productive relationships with colleagues / stakeholders.
- Demonstrates a clear commitment to the Foundation's values: bold, inclusive, relational and can-do.
- Shows a strong commitment to diversity, equity, inclusion and belonging for all in their work and approach.
- Demonstrates commitment to continuous learning and professional development.

Recruitment process

We're committed to a recruitment process that is fair, inclusive and structured, giving you a clear sense of what to expect at every stage. The process usually follows the steps outlined below, and if you make a successful application, we'll send you a more detailed breakdown ahead of time. This will usually include themes for interview questions in advance.

Step 1: Application

Start by completing an application form using our recruitment portal (Hireful). The form will ask two or three tailored questions, designed to help you demonstrate your experience, motivation and alignment with our values. You'll also be asked to upload your most recent CV.

Step 2: Interview

Final interviews are usually held in person and give us the chance to explore your application in more detail including your experience, what drives you and how you connect with our mission. To help you prepare, we share the themes and topics of interview questions with you in advance.

It may also include a task, presentation or scenario-based questions to explore your suitability in more depth. You'll have the opportunity to meet key members of the team and get a real feel for our culture and ways of working.

Using AI in the Application Process

We recognise that some candidates use AI tools such as ChatGPT to help write their applications. We understand. Applications take time, and it can be hard to know where to start. However, there are some common pitfalls that can affect the strength of your application. We've put together some tips to help you navigate this to submit an outstanding application. [Read them here](#). For full transparency, we also use AI to help streamline our selection process including sifting applications. We always do quality checks to test AI outputs and all of our final decisions are made by human beings.

A note on Imposter Syndrome

Imposter Syndrome is the feeling that you don't truly deserve your success, or that you're not as capable as others perceive you to be. It can be particularly present when applying for a new role. It's long been recognised as disproportionately affecting people from marginalised groups. If this resonates with you, please know that we actively want to hear from people of all backgrounds.

Your Application

Selection Timeline

Optional Q&A Session: Friday 3rd July 2026 at 14:00-15:00

Closing Date: Midday, Thursday 16th July 2026

Interviews: Tuesday 28th July 2026

How to Apply

We offer an optional Q&A (on the date above) to all potential candidates. This is to talk about the organisation, explain the process and help you put in the best possible application. You can register your place using [this link](#) where you will receive a Microsoft Teams link to join the session.

To apply, please complete our [online application form](#). As part of the application you will be asked to complete short answers to the following three questions. You may find it helpful to prepare your answers in advance and paste them into the recruitment portal when you are ready to submit:

- Why are you interested in applying and how do you feel your values align with the values of Lloyds Bank Foundation (300 words max.)
- What are the key achievements in your experience that make you a strong candidate for this role? (300 words max.)
- How would you balance the need for robust compliance, safeguarding and governance controls with building positive relationships with applicants and other stakeholders? (300 words max.)

If you have any queries about the application process, please email LRecruitmentMailbox@lloydsbankfoundation.org.uk



lloydsbankfoundation.org.uk

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