Caseworker Recruitment Pack
Welcome to Foothold,

Our story

We may not know much about engineering, but we do know engineers. We’ve been supporting IET members and their families since 1890.

We understand people and we understand how life can be at work and at home. It’s unpredictable, complex, demanding.

Amidst the busyness of our lives we often forget that being well is just as important as doing well.

More of us are feeling stressed in our jobs. One in four of us will have a mental health problem this year. More of us are living longer. Our health needs are growing yet we have a shortage of carers. Rising costs are forcing living standards down. And we’re facing a loneliness epidemic.

We all need to start taking better care of one another, because we all need a little support from time to time. Even engineers.

We wanted to know how we could do more, so we asked our engineering community. Seven out of ten engineers worldwide said they wouldn’t ask for help even if they needed it. Yet they also told us there isn’t enough support out there for day-to-day problems, let alone a crisis.

We’re here so engineers and their families never need to face life’s challenges without support. We want engineers across the world to feel supported in all aspects of their lives and to feel that it’s OK to ask for that support. We want them to be healthy and able to stand on their own two feet. We want them to feel looked after but also empowered by their professional community.

Funded by engineers, for engineers, Foothold is here for engineers and the people who matter to them most. Whatever the problem, big or small.

Foothold is a starting point, giving them the tools to make their lives better right now.

Foothold is a network of skilled individuals who’ll listen to our community’s problems in confidence. It’s a source of options to help them meet their needs emotionally, physically and financially.

Foothold is a place where they can regain their balance and help others do the same.

So we say to our engineering community “Your Foothold is here”.

Dec 2021
**Our challenge**

In 1890 a group of engineers decided that their Institution should do something for fellow engineers in need. In the following 130 years we built on that idea and now provide support to almost 2,000 engineers and family members a year, from across the globe.

And now as Foothold, The Institution of Engineering and Technology benevolent fund, we exist to ensure that no engineer or their family needs to face life’s challenges without support and with 150,000 current members of the Institution of Engineering and Technology and many previous members spread across 150 countries this is a challenge.

Our vision is to increase the wellbeing of engineers and their families worldwide and to achieve this during the continuing uncertainty of the global pandemic will require skills, imagination and expertise.

Our targets are stretching and have seen us grow our profile since the launch of our strategy in 2019 with a new brand, new services and new ways of supporting our community and more than trebling the number of people we have supported.

But there is still so much more to do …..

As with many other charities, our resources have been stretched to meet this demand but together, we have risen to the challenge, refocusing our skills and expertise, prioritising support to those most in need and maximising every channel of support for our community.

Our caseworkers are pivotal to these changes, identifying those most in need through individual assessments, providing information and advice on simple enquiries to questions about care for people with complex needs and helping lift engineers and their families worldwide out of poverty.

We are a small team who need to make a big impact. If you think that you have the skills and experience we need and are excited by the opportunity to join a thriving forward looking team we would love to hear from you.

**Jane**

Jane Petit
CEO

**Our beliefs**
Our core beliefs shape who we are and why we’re here. They’re our take on the world and on how support should be.

Every call for help must be heard - we have a social duty to care about each other as human beings. Any need no matter how big or small, is worthy of our support. Nobody should have to face life’s challenges alone.

Asking for help takes courage - we all need support from time to time - even the most capable among us. It takes strength to accept our own vulnerability. Nobody should feel ashamed to ask for help.

The best support empowers - support is at its best when it puts people in the driving seat. When a person has the right tools to change their life, they’re more resilient to adversity strength to accept our own vulnerability. Nobody should feel ashamed to ask for help.

A problem shared is a problem halved - we can overcome challenges - together. Being part of a community means we’re there to support and empower one another.

**Our commitments**

These are the commitments we make every day to the people we support, to our work and to ourselves. These are the principles we live by:-

We’re empathic - we seek to understand your needs as if they were our own. Only through empathy and understanding can we truly support others.

We’re joined-up - we’re here to support you with all aspects of life, and to help you increase your all-round wellbeing. People’s needs are connected, so our support must be too.

We’re trusting - we treat you as an equal. Building relationships based on trust allows us to provide better, quicker support.

We’re open-minded - we listen without prejudice and act without discrimination to help you in any way we can. No challenge is too big or small.

We’re encouraging - we want you to feel able to stand on your own two feet. To feel that you can make positive choices and changes in your life.

We’re bold - to offer meaningful support, we must break down stigma, address the big issues and try new ideas without fear of failure.
Our strategy

Why our help is important

Our recent research showed that our community have three main areas of need:

- Work and employment
- Health and wellbeing
- Financial and legal problems

Our strategy focuses on activities which support an increase in wellbeing, intended to empower our community by providing tools to help them help themselves.

Then, if engineers and their families experience life events and moments of transition such as getting sick, experiencing bereavement, redundancy or relationship breakdown (all common triggers for poverty) not only can we offer practical assistance with finances or legal matters, we have also increased their likelihood of coping.

Our strategic framework

Our strategic outcomes

Providing joined-up, accessible and personalised support
- 90% of people reporting feeling fully supported in post service questionnaire in 2022

Building resilience
- 3000 people a year accessing support in 2022

Developing our community
- 200 supporters in 2022
Board and Committee structure 2021

Board of Trustees
4 meetings a year

- IET appointed x 2
- LRA appointed x 4
- Board appointed x 4
- Local representatives assembly

- Audit and investment committee
  4 meetings a year
- Service development committee
  2 meetings a year
- Remuneration & nominations committee
  4 meetings a year
- Disciplinary committee
  As required
JOB DESCRIPTION

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Foothold</th>
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<tbody>
<tr>
<td>Job Title</td>
<td>Casework</td>
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<tr>
<td>Location</td>
<td>Remote working with attendance at meetings and events as agreed</td>
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<tr>
<td>Hours</td>
<td>21 hours (Core hours Tuesday 9-11am)</td>
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<tr>
<td>Reports to</td>
<td>Service and development manager</td>
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Primary Purpose:

- To provide information, advice and ongoing support, on wellbeing related issues, to engineers and their families based on an assessment of individual need.
- To manage own caseload of community members, dealing with applications for financial assistance and wellbeing support for people with sometimes complex needs.
- To contribute to the development of services and the broader organisation.

Key Tasks

1. Casework

- To take responsibility for a caseload of new and recurring applications for financial or welfare support and the related administration.
- To undertake periodic and annual reviews of the support provided to community members receiving on-going support
- To liaise with external agencies such as local government, health and social care services professionals and other charities on behalf of community members.
- To make justified and objective decisions based on each community members circumstances and Foothold’s strategy and policies.
- To authorise grants within agreed limits in line with the associated policies and procedures
• To maintain the community member’s record on our CRM (Beacon) and ensure all necessary information, contacts, actions, decisions and grant payments are recorded appropriately
• To convey decisions to community members in a timely way
• To participate in regular case reviews conducted by members of the Service development committee (SDC) and, where required, attend and contribute to the SDC meetings
• To have knowledge of confidentiality issues and apply safeguarding policy and procedure as necessary

2. Helpline
• To cover the helpline, as part of the team rota, providing information, advice and support to engineers and their families through a range of media
• To give advice on welfare related issues, including state welfare benefits, care assessments and other statutory support/entitlements
• To identify and signpost on to organisations offering specialist advice and support and Foothold’s digital health and wellbeing support as appropriate
• To advise potential applicants, for financial and welfare support, of eligibility criteria and the application procedure, sending out application packs as appropriate
• To refer to the outsourced legal helpline and other partnership services

3. General
• To have an awareness of Data Protection legislation.
• To keep up to date with changes in welfare benefits and legislation relating to social care
• To contribute to the updating and development of welfare procedures
• To contribute to volunteer training as appropriate
• To attend monthly supervision, team and staff meetings
• To make use of our bi-monthly coaching alongside supervision
• To be responsible for health and safety within your working environment.
• To maintain and develop links with appropriate departments in the IET
• To be alert to opportunities to promote and develop the service
• To contribute to the ongoing EDI strategy
• To carry out any duties reasonably requested by line manager or CEO
• To participate in the future development of Foothold in line with the strategy
## Caseworker Person Specification

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<thead>
<tr>
<th>Criteria</th>
<th>Essential</th>
<th>Desirable</th>
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<tr>
<td><strong>Experience</strong></td>
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<tr>
<td>Previous experience of dealing with people in distress, with a track record of providing appropriate support and enabling them to find solutions</td>
<td>✓</td>
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<tr>
<td>Experience of managing a number of, sometimes complex cases, to a high standard with excellent people management skills</td>
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<td>✓</td>
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<tr>
<td>Experience of providing generalist advice and support to people in areas such as welfare, benefits, disability, care and employment, mental health and wellbeing needs</td>
<td>✓</td>
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<tr>
<td>Previous experience of being the first point of call for people requesting support</td>
<td>✓</td>
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<td>Experience of providing support to people who are not based in the UK or whose first language is not English</td>
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<tr>
<td>Grant administration and record keeping experience</td>
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<td>✓</td>
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<td>Experience of using databases or CRM’s</td>
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<td>Experience of working in an organisation that is developing and changing to reflect need</td>
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<td>Experience of working with volunteers</td>
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<td><strong>Qualifications</strong></td>
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<td>Educated to degree level or equivalent experience</td>
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<td>Counselling, coaching or advice and guidance qualification</td>
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<td>Evidence of CPD</td>
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<tr>
<td><strong>Competencies</strong></td>
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<tr>
<td>Ability to assess complex cases and prioritise the needs of people.</td>
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<td>Ability to use own initiative to manage a broad spectrum of enquiries and deal patiently and empathetically with people who may be confused, worried, have mental health issues or be embarrassed about contacting a charity for assistance</td>
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<td>Ability to prioritise and manage own workload and diary</td>
<td>✓</td>
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<td>Ability to research and identify appropriate resources and referral options to meet individual needs</td>
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<td>Ability to communicate effectively with a broad range of people</td>
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<td>Ability to collate information and use it to produce accurate, detailed and objective reports</td>
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<td>Ability to take quick, effective action, using problem solving and decision-making skills</td>
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<td>Ability to work remotely as part of a team</td>
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<td>Excellent organisational, administration and IT skills</td>
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**Knowledge**

| Knowledge of the benefits and welfare system | ✓ |
| Knowledge of the charity sector and national support agencies | ✓ |
| Awareness of data protection issues and relevant legislation | ✓ |
| Understanding of confidentiality, safeguarding and following procedures | ✓ |

**Attitude**

| A proactive, self-motivated, yet empathetic individual, able to work in a small team | ✓ |
| A positive approach and a willingness to work flexibly to support other team members | ✓ |
| A willingness to travel to visit members (could include overnight stays) | ✓ |
| A willingness to work with colleagues on other specified duties or projects as appropriate | ✓ |
| A willingness to undertake training for further development | ✓ |
Support services – the new normal

November 2021

Pillar 1: Customer service

We care about our members
  • We listen to our members
  • We are curious and ask questions
  • We are responsive and work to agreed timeframes
  • We have clear policies and procedures
  • We use our grants database consistently and uniformly to manage support
  • We explore external support both in the UK and overseas
  • We advocate where we can
  • We review our support offer at regular intervals

Pillar 2: Financial management

We manage our budget
  • We review our budget every month at our team meeting
  • We have 3, 6 and 9 month ‘check in’s’ with members
  • We facilitate timely annual reviews
  • We support our members to maximize income from other sources
  • We are creative about how we use funds for one off grants
  • We look for new ways of working to distribute our funds for Spiers/Wilde/Lord Hurst funds

Pillar 3: Fundraising

We contribute to the fundraising strategy
  • We have open communication and are engaged in the work of the fundraising and comms team
  • We actively look for community stories
  • We contribute to blogs and online resources
  • We share social media with our networks
Period of appointment:
This is a permanent contract

Salary
c£29,000 pa (pro rata)

Location
Remote working with attendance at meetings and events as agreed

Staff benefits
- 25 days per annum annual leave and Bank Holidays (pro rata) plus 3 days compulsory leave between Christmas and New Year
- Based remotely with flexible working arrangements – core hours Tuesdays 9am to 11am
- Organisational commitment to training and development
- SIPP pension with up to 9% employer contribution (subject to individual contribution)
- Life insurance, Childcare vouchers, cycle scheme, IT scheme
- First year associate membership of the IET and access to Foothold’s services

How to apply
To apply, please send a CV (including current salary level) and an additional covering letter, of no more than two pages, explaining your interest in this post and how you meet the points in the person specification above. Please also give details of two referees who we will contact once a formal offer of employment has been made. Finally, kindly complete the equal opportunities monitoring form attached.

Applications should be submitted by 12 midday Wednesday 5 January 2022 to denice.houslin@myfoothold.org.

Shortlisted candidates will be contacted by 13 January 2022

Interviews will be held on Thursday 20 January 2022 by Zoom

For a confidential discussion about the role, please contact Denice Houslin at denice.houslin@myfoothold.org

For more information about Foothold please visit www.myfoothold.org

Equal opportunities
Foothold is fully committed to eliminating discrimination and promoting equality and diversity in our workforce and employment practices, in the work we undertake, and in the provision of all our services. We therefore expect all of Foothold staff and volunteers to be willing and able to make a positive contribution to the promotion and implementation of Foothold’s Equality and Diversity policy.