



Foothold

Supporting engineers



Grant Assessor Recruitment Pack

Foothold, The Institution of Engineering and Technology Benevolent Fund. A Company limited by guarantee. Registered in England. Registration No. 00441284. Registered Charity No. 208925. Registered office: Unit 82A, James Carter Road, Mildenhall, Suffolk, IP28 7DE United Kingdom



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 community. Seven out of ten engineers worldwide said they wouldn't ask for help even if they needed it. Yet you 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 you them the tools to make your life better right now.

Foothold is a network of skilled individuals who'll listen to your problems in confidence. It's a source of options to help you meet your needs emotionally, physically and financially.

Foothold is a place where you can regain your balance and help others do the same. Your Foothold is here.

Our challenge

In 1890 a group of engineers decided that their Institution should do something for fellow engineers in need. In the 133 years since we have continued to develop services which support 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 alone and with 154,000 current members of the Institution of Engineering and Technology and many previous members spread across 148 countries, this is a challenge.

Our ambition is to increase the wellbeing of engineers and their families worldwide and we developed our 2022-27 strategy to help us achieve that.

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.

A word about flexible and remote working

We have worked remotely since the beginning of lockdown and since January 2023 with no office base. For us flexible working is about being outcomes focussed and

empowering our teams to choose what time they begin to work, where to work, and when they will stop work based around core hours of 10 – 4pm on a Tuesday for the senior team and 10-11 on Tuesday for the whole team. The idea is to help manage our work-life balance, reduce stress and increase our overall job satisfaction.

However, working in this way is not without its pressure points and so we have regular in person team and individual meetings, bi-monthly coaching sessions and provide equipment that will allow you flexibility to work from home, your local library or café if that suits you best.

We encourage virtual water cooler catchups, coffee breaks and walking meetings, whatever it is that works for you and our community.

Our future

There is no doubt that the current environment is challenging for our community and also for us as a charity and we have been working hard to ensure that we have a sustainable framework in which to develop and meet the diverse needs of our community going forward.

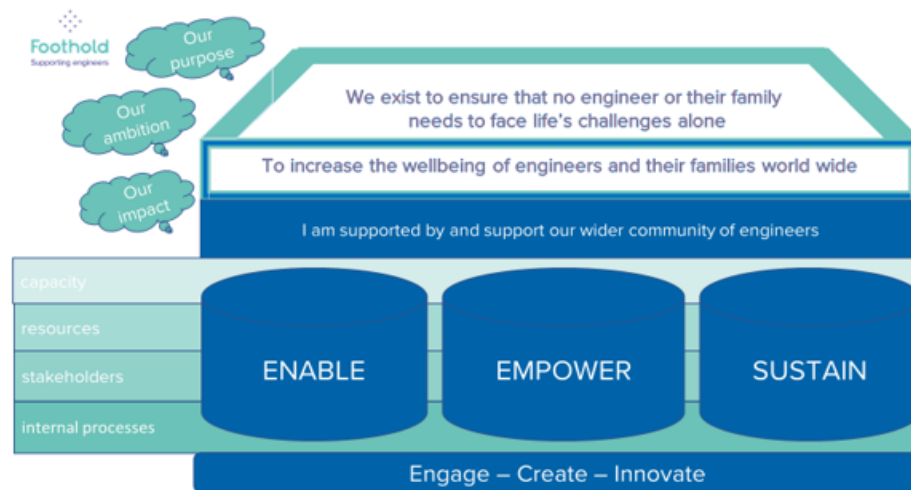
We are a small team who want to make a big impact. If you think that you have the skills and experience we need and are excited by the opportunity to join a thriving, forward looking team we would love to hear from you.

Jane

Jane Petit
CEO



Our strategic framework



Our beliefs




Every call for help must be heard



The best support empowers



Asking for help takes courage



A problem shared is a problem halved

Our strategic objectives

ENABLE our community to participate in a socially inclusive lifestyle

- achieving a household income of 75% of MIS level for eligible community members
- amplifying voices of organisations advocating for social change around poverty and associated issues

EMPOWER our community to increase their resilience to life's challenges

- creating connected communities
- developing digital health and wellbeing offers
- engaging with new partners to widen our scope
- creating positive change by developing our understanding of the equality, diversity, equity and inclusion issues and how we can address them
- being a barometer for the health and wellbeing of our engineering community

SUSTAIN support for and from our community

- engaging our community with our purpose
- increasing our voluntary income
- maintaining expenditure within budget
- creating innovative models of volunteering

Our strategy

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

- Financial
- Health and wellbeing
- Underemployment and legal queries

Our strategy focuses on activities which can both relieve and prevent poverty within our global community by provision of direct support alongside our digital health and wellbeing programme.

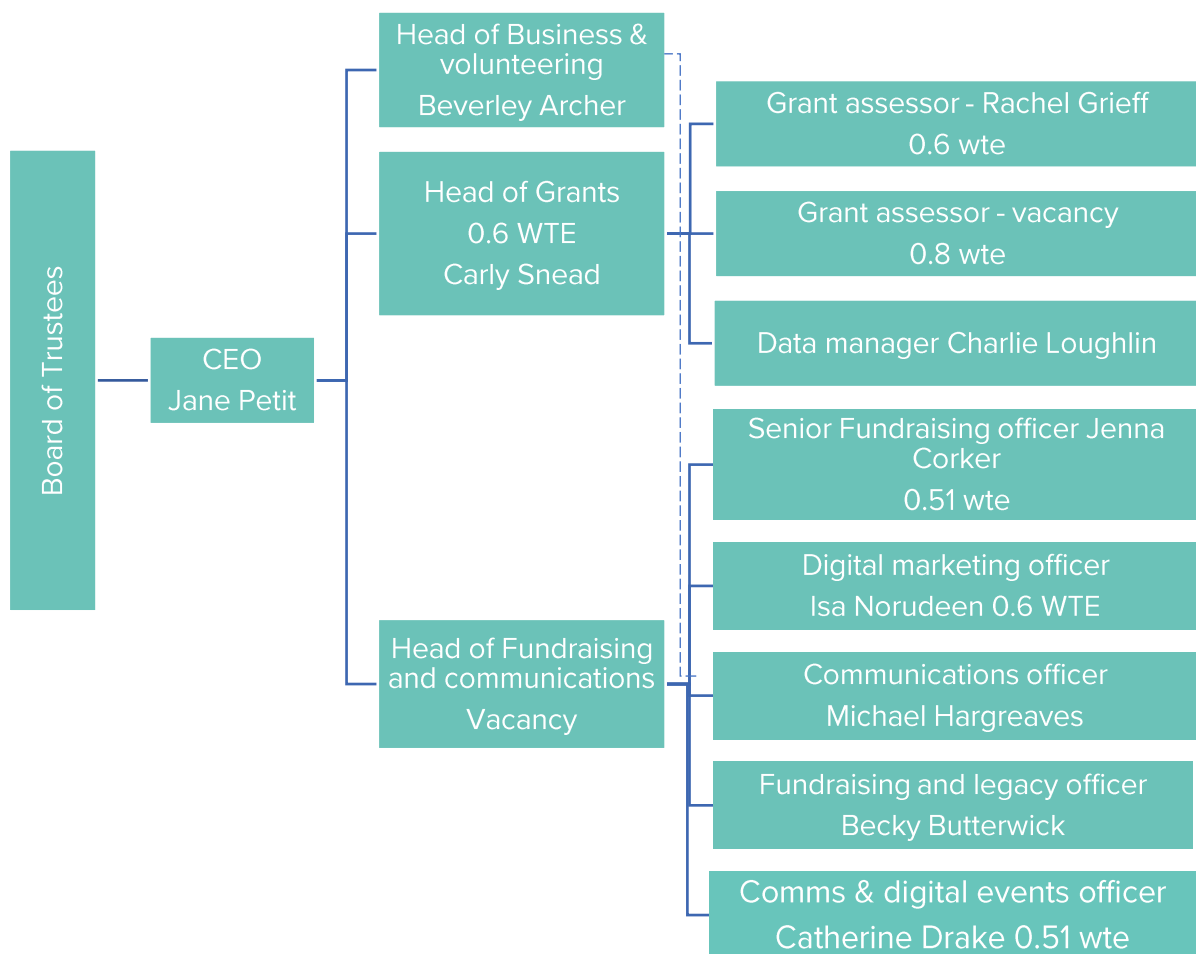
Underpinning this we are working to develop a connected community, which includes our staff team, where we can all find help and give help as meets our needs at the time.

In this way we believe that when 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 timely practical assistance with finances or mental health issues, but we have also laid foundations that have increased their likelihood of coping.

With our 2019-22 strategy we achieved amazing things



and by working together and maximising our expertise in 2022- 27 we'll do even more to increase the wellbeing of engineers and their families worldwide.



Foothold July 2024



About you and the role

This role has many facets and as our Head of Grants says....

“Here at Foothold, we hear from individuals who are experiencing a variety of challenges each day. It could be short term displacement in one country, economic challenges in another, shortages of work opportunities elsewhere, physical, or mental disabilities that make finding and sustaining employment difficult, or the challenges that come when a member of the family is ill or disabled – whatever the situation we want our community to know that they can turn to us and receive a compassionate and helpful response.

As a Grants Assessor, you’ll be providing vital support to our community members from all over the world. One day you could be working through an application someone has submitted for support, and the next you could be discussing a complex request from someone else who has contacted our Helpline and navigating your way through how best to support that person.

Our support is not just about finance, it’s about the wellbeing of the whole person, and it’s about how we can maximise income for them from other sources, it’s about utilising our digital support. Sometimes the application won’t meet our remit. Your role as our new Grants Assessor will help to ensure we can continue to support our community members in a multitude of ways. Being a listening ear for members, exploring ways we can offer support if we’re unable to support them directly, which may include using our My Money Checker service and exploring other options for community members.

This is a great opportunity to join a small, committed team and allow us to provide on-going support for our community and we look forward to hearing from you”.



Carly Snead

Head of Support Services (to become Head of Grants July 2024)

Your skills and experience

Criteria	Essential	Desirable
Experience		
Experience within a grant-making role or proven knowledge of the grant-making / benevolent sector.	✓	
Experience of providing help and guidance, predominately over the phone and via email, offering support to community members throughout the grant making process, and other sources of potential help.	✓	
Experience of co-ordinating and referring beneficiaries to support services (eg debt support).		✓
Experience of prioritising help in a methodical manner for individuals who may be at crisis point and have the skills to manage expectations.	✓	
Experience of dealing with confidential, personal and sensitive information.	✓	
Qualifications		
A-Levels or NVQ equivalent	✓	
Educated to degree level		✓
Evidence of CPD	✓	
Competencies		
Excellent attention to detail	✓	
IT literate (MS Office, databases, email)	✓	
Excellent communication skills	✓	
Excellent inter-personal skills and demonstrable ability to work remotely	✓	
Ability to prioritise and manage own workload and diary	✓	
Ability to multi-task, work in a well-organised manner, manage own workload and ability to prioritise urgent applications.	✓	
Ability to interpret grant criteria effectively and process grants in line with the criteria.	✓	
Ability to research and identify appropriate resources and referral options to meet individual needs	✓	
Ability to communicate effectively with a broad range of people	✓	

Ability to show empathy and deal objectively with individuals who are experiencing a broad spectrum of difficulties	✓	
Ability to deal patiently with people who may be confused, worried, have mental health problems or be embarrassed about contacting a charity for assistance	✓	
Knowledge		
Knowledge of the benefits and welfare system		✓
Knowledge of the charity sector and national support agencies		✓
Knowledge of data protection issues and relevant legislation		✓
Knowledge of confidentiality, safeguarding and following procedures	✓	
Attitude		
An interest and understanding of the challenges faced by engineers and their families.	✓	
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 work with colleagues on other specified duties or projects as appropriate	✓	
A willingness to undertake training for further development	✓	

About the role

Organisation	Foothold
Job Title	Grants Assessor
Location	Remote working with attendance at meetings and events as agreed.
Hours	1 role available (28 hours), permanent, part time (dependent on successful candidate(s)) (Core hours Tuesday 10-1pm)

Salary	£30k per annum (pro rata)
Reports to	Head of Grants

Primary Purpose:

The principal responsibility of the Grants Assessor is to be the main point of contact for all individual applicants to the Charity. Working with colleagues they will ensure that applications are processed efficiently, in line with our processes and grant eligibility criteria.

Main tasks:

Working alongside other Grants Assessors, Head of Grants and other Foothold staff and volunteers the Grants Assessor will:

1. Deal with applicant enquiries

- Act as the duty grants assessor according to the agreed rota
- Respond professionally to community members who contact the Foothold grants team by email, web form, grant application or telephone.
- Provide guidance to community members in relation to Footholds grants criteria and process, ensuring they understand how to apply and that their request fits within our criteria.
- Discuss any additional needs expressed by the community member to help them complete an initial enquiry with the Head of Business and Volunteering.
- Review answer phone messages as per the rota, ensuring all messages are responded to in a professional manner.
- Monitor the 'hello@' email address as per the rota and respond to emails or pass them to the appropriate colleagues in a timely and efficient way.
- Identify any potential safeguarding concerns at an early stage, escalating appropriately and in the timescales outlined in Footholds safeguarding policy (G01A) and procedure (G01C).
- Liaise with the Head of Grants as necessary, for advice and guidance.
- If the community member meets our eligibility criteria and you are the duty grant assessor allocate the case to yourself or another Grants assessor according to the rota. Otherwise send the case via Beacon for decline.

2. Process cases to ensure grant applications are processed in an efficient and timely manner

- Once a case has been opened verify that the community member meets Footholds membership eligibility criteria.

- Ensure that any potential duplicate entries on BeaconCRM are explored and resolved before proceeding with the case.
- Prioritise any cases with particularly urgent requests
- Check that each application is complete, and all the required documentation has been submitted via the portal or email and follow up with community members as required to ensure all information and supporting documents have been submitted.
- Input data from documentation into the case record on Beacon accurately and in line with Footholds processes to enable decision making, review and reporting.
- Use Beacon to process all elements of a case so that in the absence of a team member cases can be monitored and processed appropriately.
- In-line with BeaconCRM's outcome on income and savings eligibility, prepare an objective, non-judgemental decision in line with the grants policy and submit for approval or decline using the Beacon approvals process
- Undertake administration of all applicant and grant information to ensure data is kept and disposed of appropriately under GDPR policies.
- Be proactive by suggesting improvements for grant-making processes.

3. Supporting community members in a professional way, providing guidance and information

- To provide clear guidance to community members throughout the application process.
- To complete a My Money Checker (MMC) for each case in line with the process to inform applicants of other potential sources of help and support (e.g. Footholds wellbeing portal, Footholds App, Footholds Differently Wired Hub, state benefit entitlements, other benevolent funds, charities with an interest in engineering etc) utilising the InBest benefits checker and Advice Finder.
- To respond to community members queries quickly and accurately throughout the application process.

4. Implementing grant decisions in a timely manner

- Notify community member of grant decision or reason for decline in line with process and include MMC requirements and guidance, conditions of grant, schedule for receipts or invoices.
- Accurately update Beacon with bank details and payment dates in line with process to ensure payments are made accurately and in a timely manner
- Log community member feedback including thank you messages, any dissatisfied comments, potential community stories for marketing purposes.

5. Ongoing review of regular cost of living grants

- Undertake case review at 3 and 6 months and annual review at 12 months according to Foothold's procedure

Other reasonable duties and projects commensurate with the post, including:

- Attend weekly team, monthly 1:1 and all-staff meetings
- Adhere to the charity's policies at all times.
- Support colleagues in marketing and fundraising campaigns run through social media or in person where appropriate.
- Review and evaluate own performance, identifying and acting upon areas for improvement and development.
- Be responsible for health and safety within your working environment.
- Contribute to the ongoing Equality, Diversity, Equity and Inclusion strategy
- Carry out any duties reasonably requested by line manager or CEO
- Participate in the future development of Foothold in line with the strategy.

Terms and conditions

Period of appointment: This is a permanent contract.

Location: Remote/homebased

Full time: 28 hrs a week

Organisational benefits

- 28 days per annum annual leave plus Bank Holidays (pro rata, 3 days preferably to be taken between Christmas and New Year)
- Flexible working arrangements
- Organisational commitment to training and development.
- SIPP pension with up to 9% employer contribution (subject to individual contribution)
- Life insurance and access to Smart Health services (AIG)

- Cycle to Work and Tech Scheme, childcare vouchers.
- Associate membership of the IET and access to Foothold services

How to apply

The application pack, equal opportunities monitoring form and our Impact report 2022-23 can be downloaded here

<https://www.myfoothold.org/get-involved/work-with-us/>

If you have any further questions about the role please contact our Business manager [Beverley Archer](#).

To apply:

Please submit your CV and a supporting statement of no more than two pages explaining your interest in this post and how you meet the points in the person specification to beverley.archer@myfoothold.org. Please include your completed equal opportunities monitoring form.

Closing date: applications should be uploaded by 4pm on Friday 12th July

Interviews will be held on Friday 19 July 2024 on Teams.

For more information about Foothold please visit [our website](#)

Equal opportunities

Foothold values equality and diversity, and welcomes applications from candidates regardless of sex, race, disability, age, sexual orientation, gender reassignment, religion or belief, marital status, or pregnancy and maternity.

Foothold, in compliance with the Disability Discrimination Act 1995, will seek to make reasonable adjustments to overcome barriers to employment caused by disability and/or neurodiversity, and encourages applications from these candidates. If you need any reasonable adjustments, please contact PSR on 01242 691683. We guarantee to offer an interview to those with a disability who meet the minimum criteria.

Recruiting Applicants with Criminal Records: Applicants with criminal records are welcome to apply for roles at Foothold. Advice and guidance on disclosing a criminal record can be obtained from Unlock. Successful appointment is subject to DBS checks appropriate to the post and references.

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, Diversity, Equity and Inclusion policy.