

Role profile: Vetlife Financial Support Casework Administrator

<p>Role title: Vetlife Financial Support Casework Administrator</p>	<p>Responsible to: Vetlife Financial Support Casework Officer</p>
<p>Team: Vetlife</p>	
<p>Purpose of role: Administrative support for Vetlife Financial Support Casework Officer in the assessment and delivery of Vetlife financial support to beneficiaries of the charity.</p>	
<p>Key responsibilities:</p> <ul style="list-style-type: none"> • Administrative support for the assessment and provision of Vetlife Financial Support by: <ul style="list-style-type: none"> ○ processing of new applications for support; ○ accumulating necessary application related evidence; ○ accurate record maintenance of case management and beneficiary reviews; ○ administration of Annual Review of Beneficiaries. • Organisation and facilitation of training provision for Area Representatives. • Administration of changes in Area Representation including: <ul style="list-style-type: none"> ○ new applications for role of Area Representative; ○ assignment and re-assignment of beneficiaries to Area Representatives. • Monitoring of training attendance by Area Representatives. • Attendance at annual training for all new and existing Area Representatives • Liaison with the Citizens Advice Bureau and the Vetlife Health Support provider as appropriate. • National event attendance to promote Vetlife Financial Support as required. • Performance of other administrative duties as requested by line manager. • Creation and updates of spreadsheets of monthly grants to Beneficiaries. 	
<p>People management:</p> <ul style="list-style-type: none"> • To plan and implement the above responsibilities in consultation with the Vetlife Financial Support Casework Officer. • The role holder will sometimes be the first line of enquiry with people in distress or in need and will need to deal with them in a sympathetic and professional manner. • The role holder will liaise with the Staff, Officers and Trustees of Vetlife both through their line management and, where necessary by direct contact. • The role-holder is expected to suggest and implement any agreed changes which are likely to benefit the organisation and/or its beneficiaries. 	
<p>Financial resources:</p>	

- NA

Knowledge, skills, and expertise:

- Good interpersonal skills
- Education to tertiary but not necessarily degree level
- Experience in safeguarding is an advantage
- Knowledge of grant-making systems and charity procedures
- Knowledge of the welfare benefits system
- Experience in mental health is an advantage
- Experience in employment legislation and small businesses is an advantage
- Knowledge of administration in an office environment
- Proficiency in use of all Windows-based software including Excel
- Must be numerate
- Knowledge of charity law and finance is an advantage

- The role holder will also be expected as part of the role to:
 - undertake mental health first aid training;
 - undertake regular safeguarding training;
 - undertake regular training in GDPR;
 - keep up to date with changes to the state welfare and benefits systems;
 - keep up to date with Vetlife policies regarding Vetlife Financial Support and Area Representatives.

Other information:

The role holder will often be the first point of contact for beneficiaries, and a professional and caring approach is essential, as befits the profile of a benevolent charity. Dealing with potential beneficiaries, some of whom may be distressed, requires particular sensitivity.

It is essential that the Fund is managed to a high standard so that beneficiaries are provided for properly and that Trustees are given timely and accurate information to assist in their decision making and to ensure compliance with Charity Commission guidance.