

## **Role Profile**

<b>Role Title: Vetlife Financial Support Case Worker</b>	<b>Responsible to: Vetlife Operations Manager and Vetlife Honorary Secretary</b>
<b>Department: Vetlife</b>	<b>Responsible for: N/A</b>
<b>Purpose of Role:</b> Responsibility for the day to day administration of Vetlife Financial Support.	
<b>Key Responsibilities:</b> <ul style="list-style-type: none"><li>• Daily administration of Vetlife Financial Support including being first point of contact for Area Representatives and beneficiaries, processing new applications for support, accumulating evidence, making recommendations to the Grant Awards Panel; keeping accurate records of case management and beneficiary reviews; administration of Annual Review of Beneficiaries;</li><li>• Monitor the provision of Area Representatives, arranging recruitment drives when necessary, Processing applications from prospective Area Representative volunteers and conducting initial suitability interviews;</li><li>• Organising and attending training for new Area Representatives, facilitating the provision of training;</li><li>• Carrying out an induction for new Representatives, including administration such as ensuring paperwork is completed, setting up accounts on our secure database (Glasscubes) and briefing beneficiaries;</li><li>• Administering changes in Area Representatives including reassigning beneficiaries;</li><li>• Organising and attending annual training for all existing Area Representatives;</li><li>• Assisting with the development and review of the Safeguarding policy, ensuring it is fit for purpose and up to date, and attending regular safeguarding training as Deputy Safeguarding Officer for the charity;</li><li>• Liaising with the Citizens Advice Bureau and the Vetlife Health Support provider as appropriate;</li><li>• Undertake regular training in GDPR;</li><li>• Keep up to date with changes to the welfare and benefits system;</li><li>• Assist with development and evolution of policies regarding Vetlife Financial Support and Area Representatives;</li><li>• Undertaking any other administrative duties as requested by line manager.</li></ul>	
<b>Scope of role</b> To plan and implement the above responsibilities in consultation with the Vetlife Operations Manager.	
<b>People</b> 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 Officers and Trustees of Vetlife	

**Initiative/innovation**

The role-holder is expected to suggest and implement any agreed changes which are likely to benefit the organisation and/or its beneficiaries.

**Resources**

Any expenditure will require prior authorisation from the appropriate Manager/Officer.

**Influence/impact**

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 the Charity Commission.

**Knowledge, skills and expertise**

- Good interpersonal skills
- Education to tertiary but not necessarily degree level
- Experienced in safeguarding
- Knowledge of grant-making systems and charity procedures
- Knowledge of the welfare benefits system
- Experience in mental health 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