



Bank Workers Charity

Supporting the health and wellbeing of the banking community

Services & Grants Administrator – Services & Grants Team

Applicant Information Pack

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Introduction

Thank you for your interest in joining us at the Bank Workers Charity.

We're committed to transforming the wellbeing of the banking community - current and former bank workers, retirees and their families. We do this through financial support, advice and information through our staff and partners, and by working closely with the banks to promote the wellbeing of their staff.

This year we're 141 years old, and we're needed now more than ever. In 2022 we launched our new strategy to reflect the changing needs of the banking community. Our new strategy is one of growth and development whilst putting our commitment to equality, diversity and inclusion and those we support at the heart of what we do.

We continue to invest to grow the range and reach of our services, and over the last year we supported more clients than ever before. As well as our own dedicated team, we work with a number of specialist partners who make it possible for us to deliver both preventative and transformational support, to those who really need it.

Our Database and Insights Manager plays a pivotal role in the charity by managing and developing our Salesforce CRM that forms the backbone of the systems and processes we use to provide our clients with the help they need. The successful candidate will also be a champion of evidence-based decision making and use data analysis and visualisation to deliver actionable insights across the organisation.

Our success can only be achieved through the talent of the people who work in our team. We want to lead by example in supporting the wellbeing of our staff and have a generous package of support for staff and put wellbeing and resilience at the heart of how we support our team.

We believe that through focus, innovation and working with the UK's banks and key partners, we can transform the lives of the people we support. We are focused on making our vision of being a leading charity, providing high impact solutions that genuinely meet the needs of all of the banking community, a reality. We need great people to work with us to help us do this.

Jonathan Saverimuttu

Chief Executive Officer

Key strategic priorities 2022 – 2025

Building the wellbeing of the banking community

Deepening our connection with the banking community

Equality, diversity and inclusion in everything we do

Strengthening our organisation

Building our financial sustainability

Building the wellbeing of the banking community

We will work alongside the community to coproduce our services, and will develop a culture of continuous improvement, optimisation and innovation to ensure we stay relevant and create the best value possible for our resources.

We will see year-on-year growth in the number of clients we support, increasing the difference we make to the lives of the banking community.

Deepening our connection with the banking community

We will increase our direct engagement with the banking community, using communication and content that respond to their needs, feel relevant to their lives and enhance their wellbeing.

We will use thought leadership to enhance our reputation, build trust and confidence, and improve the wellbeing of banks

Equality, diversity and inclusion in everything we do

We will ensure that equality, diversity and inclusion is a common thread that runs through all our work – that we're a welcoming, inclusive workplace for all; that the diversity of our community is represented at every level of our organisation and is able to fully participate in our work; that our services reach our full community and respond to the diversity of needs within it, and that we visibly represent and celebrate the diversity of our community in our work.

Strengthening our organisation

We will ensure that our organisational governance reflects best practice in our sector, and that we have the operating model our organisation and our clients need for the future. We will develop our organisational approach to ESG (Environment, Social and Governance).

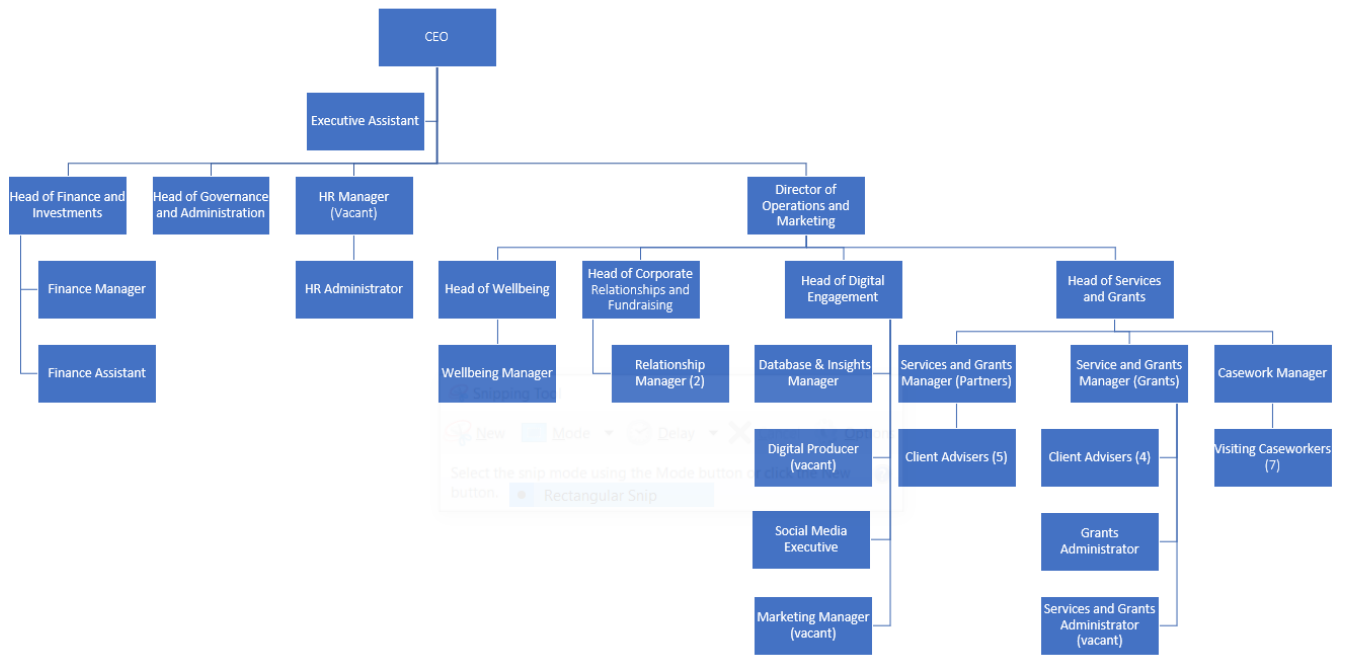
We will strive to be a leader in staff wellbeing, demonstrating our expertise through our actions, and will develop an organisational culture in which everyone is empowered to fully contribute our success.

Building our financial sustainability

We will develop and implement a socially responsible investment policy that maximises returns whilst taking a balanced approach to risk and leveraging our assets to further our charitable purpose.

We will diversify our income to reduce dependence on investments and consider value for money in all of our decisions.

Organisational structure



Our values and behaviours

Bank Workers Charity's organisational values are **Integrity, Caring, Respect, Fairness and Achievement**.

Living these values applies to all employees and we value the services and relationships of those who share similar values, such as suppliers and partners. The values will be referenced in particular when recruiting new staff and in staff performance reviews. Detailed below is a set of behaviours which link with and reflect our values.

Our values and what they mean				
INTEGRITY	CARING	RESPECT	ACHIEVEMENT	FAIRNESS
Our clients sit at the heart of everything we do.	We care about our colleagues and making a difference in the lives of the people we help.	We respect the people we work with, and the people we work for.	We take pride in what we do and work to get the best outcomes.	We treat people fairly and as individuals.
How we show our values				
We are professional, accountable and follow through on our commitments.	We make the effort to understand our clients' needs.	We empower our clients to make choices in order that they can improve their situation.	We are focused on quality and pay attention to getting things right.	We give each other timely and constructive feedback.
We put the shared interests of the Charity ahead of those of any individual or team.	We do our utmost to help our clients get where they need to be.	We treat people with dignity and respect.	We are innovative and creative; we push to find better ways of doing things.	We work to make everyone feel safe and encouraged to participate.
We are honest and ethical and build trust with our clients, partners and colleagues.	We build strong trusting relationships with the people we work with.	We don't just talk, we work hard to listen, understand and to be understood.	We proactively and willingly collaborate to share ideas and get the best results.	We embrace diversity and seek to be inclusive.
We are proud of our Charity and protect its good reputation.	We care about the wellbeing of ourselves and others, and speak up when things aren't right.	We communicate with clients, partners and colleagues in a clear and transparent way.	We are not afraid to try new things and to learn from our mistakes.	We aim to ensure everyone gets what they need - whether they're clients, partners or colleagues.
We support our colleagues to have the courage to speak out against inappropriate behaviour.	We work well with our colleagues as one team.	We challenge others respectfully and are prepared to be challenged.	We strive to exceed expectations of clients, partners and colleagues.	We say what we mean and we do what we say.
We collaborate and communicate openly and honestly.	We recognise the need for development of individuals and teams so that we can deliver great work.	We respect the beliefs and values of others, even if we don't share them.	We are custodians of the Charity and ensure the legacy of BWC is safe.	We seek to attract and retain the best colleagues.
We are determined to do the right thing and are committed to deliver the right outcomes.	We care about the quality and timeliness of the work we deliver.	We respect the environment we work in and do our utmost to make it a great place to be.	We are self-motivated, flexible, adaptable and embrace change.	We give credit where it's due and reward our colleagues fairly.

Job description

Services & Grants Administrator – Services & Grants Team

Responsible to: *Services and Grants Manager (Grants)*

Responsible for: *No direct reports*

The working hours for this role are 21 hours a week, with flexibility to work the hours over 3 to 5 days which must include Monday and Tuesday.

The role is London based and whilst hybrid working (currently two days a week office based for FTE) is offered, the post holder will be required to be in the office more frequently at some points in the year to deal with seasonal administrative tasks.

The Bank Workers Charity has assessed the post as requiring a standard level of disclosure. Any applicant who is offered employment will be subject to a Disclosure & Barring Service (DBS) check before the appointment is confirmed.

Key Purpose:

Working alongside the Grants Administrator to provide administrative support to enable the team to deliver efficient and effective support to our clients by:

- Providing administrative support to the Services and Grants team, allocating incoming enquiries, coordinating weekly grant payments and other administrative tasks as required
- Administering a small regular grant programme
- Identifying clients who would benefit from further in-depth support whilst ensuring excellent customer service.
- Regularly reviewing the effectiveness of processes, suggesting and implementing improvements to enhance the client journey and deliver an impactful service.

Principal Accountabilities:

General Administration

Responsible for the administration of incoming enquiries to the Services and Grants Team and other day to day tasks as appropriate. To include the following:

- Management of enquiries email inbox and distribution of web-based enquiries to the Services and Grants team within one working day of receipt.
- Shared responsibility for post collection and distribution.
- Where required, contacting clients at initial enquiry stage to confirm eligibility for Bank Workers Charity services and grants alongside signposting to other specialist organisations
- Ensuring all client information is stored securely and data is protected, always following Bank Workers Charity confidentiality and data protection policies.
- Checking and feeding back on client survey responses that require following up
- Co-ordinating agendas and minutes of Services and Grants Team meetings
- When needed coordinating and arranging meetings for S&G management team, booking meeting rooms, meeting and greeting visitors, etc.
- Working in line with Bank Workers Charity policies with regard to safeguarding, confidentiality and incident reporting.

- Ensuring impartiality and confidentiality when dealing with clients.

Grants Administration

- Acting as the main point of contact for clients in receipt of regular grant payments (telephone, email, and letter).
- Coordinating the annual review of clients in receipt of regular grant payments, including processing application forms, financial evidence, and setting up payments
- Assessing income and identifying areas for potential income maximisation (e.g. benefit entitlement) for clients unaware of eligibility.
- Identifying and managing an annual list of any clients in receipt of regular grant payments who may require further help and support, for example additional financial assistance, support services and / or a home visit. Prioritising those in crisis or urgent need.
- Checking and coordinating the weekly payment run for grants to be paid to our beneficiaries including where needed, liaison with the Finance Team
- Coordinating incoming receipts for grant payments and ensuring they are logged onto the CRM database.
- Supporting the Grants Administrator in processing the annual winter grants cycle

Partner Services Administration

- Updating partner reports and inputting data for analysis by other teams within the organisation.
- Requesting banking confirmation and sending client data to partner services.
- Providing administrative support with partner services as required.

CRM Database

- Creating new electronic client files on receipt of an enquiry and maintaining records by inputting accurate data onto the Customer Relationship Management (CRM) database.
- Logging and scanning all enquiries, applications, communications and relevant documents on the CRM database.
- Updating client records when notified of changes of circumstance, e.g. new bank details, changes of address, notification of deceased.
- Completing periodic tidy up of data on the CRM database in line with Bank Workers Charity GDPR retention policy.
- Ensuring accurate inputting by the Services and Grants team of payment details on the CRM database

Work on other administrative projects and tasks as and when required and contribute to the development of administrative systems where the opportunity arises.

Any other reasonable duties within the scope, spirit and purpose of the job, as defined by the Services and Grants Manager and Head of Services and Grants.

Role Dimensions:

No budget responsibility

No people responsibility

Person Specification

Qualifications & Training	
Method of Assessment: Application & Certificate Check	
Essential requirement	Desirable requirement
Not applicable	
Experience & Knowledge	
Method of Assessment: Application, Interview & References	
Essential requirement	Desirable requirement
<p>Proven experience of working in an administrative role.</p> <p>Awareness of issues facing elderly/disabled people and services available within the wider community.</p> <p>Clear experience of handling enquiries sensitively and with compassion across multiple channels such as telephone, email and post.</p> <p>A basic understanding of the charitable and grant giving community.</p> <p>A good understanding of safeguarding, confidentiality and data protection (GDPR) procedures.</p>	<p>Experience of grant making and administration of grant programmes.</p> <p>Familiarity of the welfare benefit system.</p> <p>Demonstrable experience of working with elderly or vulnerable people, some of whom may be distressed, in financial hardship and/or living with disabilities.</p>
Skills & Abilities	
Method of Assessment: Application, Interview & Tests, if applicable	
Essential requirement	Desirable requirement

<p>Demonstrable ability to manage a high volume of enquiries from initial contact, through to allocation within a fixed timetable.</p> <p>Demonstrable ability to collate information and use it to process grant applications (working within our grants criteria and assessment of financial information).</p> <p>Proven ability to identify clients who may require more in-depth support or advocacy.</p> <p>Extensive experience of databases and CRM systems (e.g. Salesforce) ensuring accurate data entry in line with data protection.</p> <p>Excellent IT skills and familiarity with Office 365.</p> <p>Proven ability to co-ordinate meetings, organise meeting papers, meet and greet guests, write minutes.</p> <p>Organised with excellent and accurate administration skills demonstrating attention to detail.</p> <p>Demonstrable ability to communicate effectively and professionally to a broad range of clients in writing and by telephone.</p> <p>Effective writing skills: ability to write clearly, succinctly and correctly, avoiding jargon or complicated language.</p>	<p>Good level of knowledge of the charity sector, agencies and local authorities.</p> <p>Reasonable ability to analyse data and other sources of information to identify patterns, relationships and trends, providing insights for potential areas of development.</p>
<p>Personal Qualities / Competencies</p> <p>Method of Assessment: Application, Interview, References & Tests, if applicable</p>	
<p>Essential requirement</p>	<p>Desirable requirement</p>

<p>A comprehensive understanding and appreciation of the challenges our clients face and ability to demonstrate empathy alongside a professional approach.</p> <p>A demonstrable ability to be patient in dealing with people who may be confused, anxious or embarrassed about contacting a charity for assistance.</p> <p>Proven ability to prioritise and manage own workload calmly and productively when under pressure whilst keeping to deadlines.</p> <p>Strong team work ethic whilst able to work independently.</p> <p>Adaptable to changing circumstances and receptive to new ideas, initiatives and a willingness to learn.</p> <p>Demonstrated commitment to valuing diversity and contributing to an inclusive working environment.</p> <p>Able to demonstrate flexibility around the needs of the role.</p>	
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Terms and conditions

Services & Grants Administrator

Starting Salary £29,304 per annum, pro rata

Location: Central London based with hybrid working (minimum two days a week office based for FTE)

What we offer

- 28 days holiday plus public holidays (pro rata for part time staff) (with the option to buy additional leave)
- 8% employer contribution to Bank Workers Charity's pension scheme and up to 3% matched with employee contributions
- A wide range of employer funded wellbeing experiences through Heka
- Flexible benefit provision (including Medicash plan, cycle to work, payroll giving, retail discounts and electric car scheme)
- Group Life Cover (three times annual salary) with the option for additional cover
- Weekly wellbeing half hour
- Season Ticket Loan (upon successful completion of probation)
- Employee Assistance Programme

For more information about the Bank Workers Charity, please visit www.bwcharity.org.uk

Bank Workers Charity is committed to supporting diversity and inclusion and welcomes applications from all backgrounds and communities.

