



Volunteer Visitor Role Profile

Role: Volunteer Visitor

Department: Grants Team

Supported by: Volunteer Visitors Manager

The Henry Smith Charity

The Henry Smith Charity is an independent grant making trust. We aim to use our resources to help people and communities at a time of need and to bring about positive change.

The Charity was founded in 1628 by Henry Smith, a businessman working in the City of London. Since then, we have honoured the spirit of Henry Smith's will, working to combat disadvantage and meet the challenges and opportunities facing people in need throughout the UK. Today, The Henry Smith Charity is amongst the largest independent grant makers in the UK, distributing £39.8 million in 2020.

The Volunteer Visitor Role

Our grant holders are at the core of our mission and work. Our Volunteer Visitors play a vital role in visiting organisations applying for funding through our main grants programme. The visit is an important part of our assessment process as it provides the opportunity to learn about an organisation and its work in more detail. Our Volunteer Visitors meet with a wide range of extraordinary organisations working to reduce social and economic disadvantage.

Volunteer Visitors meet with key staff and trustees to explore a funding request, and discussions include the organisation's future intentions, governance procedures, financial management and fundraising plans. A visit report documents their findings and the information they provide informs the decision making process for our Grants Team and Trustees to approve or decline funding applications.

Our volunteers need to be 18 or over and because we invest in our Volunteer Visitors through our training and resources, we ask for an initial commitment of 18 months in the role.

Volunteer Recruitment

Key elements of the role

- Commitment to carry out at least one assessment visit per quarter, to be completed during office hours
- Commitment to complete all elements of an online training programme including live sessions
- Respond to HSC in good time regarding availability for visit requests
- Arrange and plan visits with organisations within a given timeframe
- Prepare for visits using the information provided by our Grants Team using Microsoft One Drive
- Travel to visits using the most economical form of transport for any journey
- Carry out thorough assessment visits with organisations applying for funding through our main grants programme
- Complete Visit Reports within a given timeframe and send to our office using Microsoft One Drive
- Engage with support and feedback from our Volunteer Visitors Manager and participate in occasional refresher training
- Adhere to the policies and procedures of HSC
- Be an ambassador for The Henry Smith Charity
- Attend The Henry Smith Charity annual Conference

Time Commitment

- Visits are allocated throughout the year and the number a volunteer is offered is dependent on the geographical location of the organisations who apply, and there can be extended periods without a visit opportunity. On average a Volunteer Visitor will be offered between 3-6 visits a year and there is an expectation Visitors will be able to take on the majority of visits they are asked to do.
- The visit itself typically takes between 1-3 hours. The average length of time a complete visit process takes is 13 hours

Support and Training

- All Volunteer Visitors are required to undertake training for the role
- New volunteers accompany an experienced Visitor on a visit as part of their training, and for their first visit they will be mentored to provide guidance and support
- The Volunteer Visitors Manager provides ongoing support and updates for all Volunteer Visitors with weekly emails, quarterly Newsletter updates and refresher training
- Volunteers are asked to attend an annual 2-day Henry Smith Charity Conference (appropriate expenses and accommodation provided). The Conference is an opportunity to meet with other volunteers, staff and Trustees and learn more about the wider work of The Charity.

Volunteer Recruitment

Safety and Wellbeing

All Volunteer Visitors have the right to carry out their duties safely and without exposure to unnecessary risk of harm and we ask all Volunteer Visitors to adhere to the procedures outlined in our Lone Working Policy.

Expenses

All volunteers are encouraged to claim expenses for all reasonable expenses incurred as a result of carrying out visits and other HSC related activities, meetings or conferences.

Person Specification

Useful Abilities and Experience

- Experience of non-profit sectors or transferable experience
- Knowledge of, or experience in grant making
- Ability to review financial information, or a willingness to learn

Essential Attributes

- Commitment to learn new skills and accept training updates
- Good prioritisation skills and able to meet deadlines
- Ability to communicate clearly and concisely in both oral and written form
- Ability to process and interpret complex information
- Ability to make evidence-based recommendations
- Self-motivated
- Empathy with HSC objectives
- Understanding of and a commitment to Diversity, Equity and Inclusion
- Good IT skills

Practical Matters

Essential

- Access to a mobile phone
- Ability to access Microsoft Word (MS Word)
- Access to a good home internet connection
- Access to a computer, Mac or tablet with a modern internet browser and an email account. Loan equipment can be provided when needed.
- Access to good public transport links and/or private transport

Desirable

- Access to a printer