

Fair economy. Better world.



External Advisory Group Grant Assessors Information pack

Freelance

Commitment: varying based on demand

Deadline for applications: 5pm 18th June 2021

Fair economy. Better world.

Introduction

Dear Colleague

Thank you for your interest becoming a grant assessor with Friends Provident Foundation.

We are an independent charity that makes grants and uses our endowment towards a fair, resilient and sustainable economic system that serves people and planet. We connect, fund, support and invest in new thinking to shape a future economy that works for everyone.

We're a catalyst for wider change, making an impact through continuous experimentation and shared learning. We do all we can to embody the change we want to see. We invest in great social enterprises and use our money in line with our values.

We are looking for assessors to support our grant application processes on a freelance, part-time basis. Included in this pack:

- The external assessor advert
- About the role
- Person specification
- Our privacy notice

We hope this information will encourage you to apply

More information about us can be found on our website – www.friendsprovidentfoundation.org. If you would like an informal discussion, please email me at abigail.gibson@friendsprovidentfoundation.org.uk

I look forward to hearing from you.

Sincerely,
Abigail Gibson
Grants Manager

Freelance Grant Assessor

We are looking for a diverse group of Grants Assessors with knowledge and experience of different aspects of the economy to support our grant application processes and make objective assessments of full (second stage) applications for funding.

We are particularly interested in people with the following knowledge and expertise:

- ‘Lived experience’ of being marginalised in economic policy issues and/or of addressing systemic structural inequalities. This means a special focus on those who hold social identities across racialisation, class, gender, disability, age, faith, sexuality, age, class and geographic location.
- Non-mainstream perspectives on the economy (e.g. decolonial; ecological; green/recovery; feminist, foundational)
- In-depth knowledge about corporate and investor behaviour change (particularly asset management industry, business structures, tax behaviours)
- Experience/expertise in local level work, be that from a Local Authority, community coalitions that take on wider projects, another funder etc
- Democratising land-based assets, and the link between local economies/communities and land use and national policy

We are also keen to recruit Assessors from across the four nations of the UK and would particularly encourage applications from people based in Northern Ireland, Scotland and Wales.

In this role you will be asked to undertake a review of application documents followed by either a telephone or face-to-face interview with the applicant so you can really get a feel for what they are proposing. We then ask you to produce a written report and work with us to finalise recommendations for whether the proposal should be funded.

The position is a part-time, freelance commitment, for occasions when we have a large number of applications. Applications are submitted quarterly but we cannot guarantee work every quarter. You will be paid a flat fee of £200 per assessment, plus travel expenses when accompanied by receipts. You will also be asked to attend a half day application review meeting which will be paid at £50.

Friends Provident Foundation

We are an independent charity that makes grants and uses our endowment towards a fair, resilient and sustainable economic system that serves people and planet. We connect, fund, support and invest in new thinking to shape a future economy that works for all. Since 2004, we've pioneered the creation of a fair economy for a better world. We take an integrated approach to our mission and capital base and, alongside grant making, use our endowment as a tool for change, including through social investments and shareholder engagement. We use our grants programme to back innovative ideas and practical projects that get to the roots of the problem, that can challenge the economic status quo and help shape a future economy that works for all.

About the role

The purpose of the role is to make objective assessments of full (second stage) applications for funding made to Friends Provident Foundation. The assessment involves a review of application documentation followed by either a telephone or face-to-face interview with the applicant and a written report. The position is a part-time, freelance commitment. We estimate that the time required per assessment is likely to 1-2 days (from setting up the interview to write-up).

The Foundation has four funding rounds per year but we will only contact you on occasions when we have a large number of applications, we also understand that you may not be available every quarter.

We will provide applications for assessment to you as soon as possible after the submission deadline, electronically. You will need to be responsive to applicants' requirements in arranging assessments which may require flexibility.

It is an important feature of this process that assessors can assess the structure and viability of the applicant organisation and the proposals for their projects while retaining independence in decision-making.

Experience of assessing is desirable as is an understanding of the legal framework relating to the funding of charitable activity. Assessors must be able to identify issues that need to be investigated in order to give a full picture of the organisation, proposed work and the fit with the Foundation's objectives.

The task of the assessor is to review application materials from both stages of the application process, the comments provided by staff/trustees and the advisory group on the first stage application, and develop a method for clarifying, confirming and understanding the proposed work.

About the role continued

The aim is to formulate an analysis of the information gathered and a sense of:

- The purpose, financial health and governance structure of the organisation leading to a judgement on its capacity to undertake the work.
- The feasibility of the proposal: in terms of match between aims and methods, timescale, budget and strategic impact.
- The organisation's approach and commitment to equality and social justice and to tackling climate breakdown.
- The level of risk the proposal represents along key dimensions.
- The legal framework of the work within the Foundation's legal guidelines.
- A draft statement on the fit of the proposal with the Foundation's objectives.
- A draft recommendation for funding for discussion with the Foundation's grants team as part of a portfolio review discussion.

Assessors will submit a report using the Foundation's assessment template and take part in a portfolio review meeting with us where assessment outcomes and recommendations will be discussed and considered. Assessors should note that their recommendation is made to the Foundation team who may decide on a different recommendation to Trustees subject to wider strategic or grants portfolio considerations.

Location

Assessors are expected to work remotely. In the future the option of working from the Foundation's office in York may be available if desirable. Assessors will be required to attend a meeting with staff and fellow assessors once per grant round. These are currently held online but may involve face to face meetings in the future.

Person Specification

Skills/Abilities

Essential:

- Analytical skills
- Ability to interpret financial information
- Ability to assess feasibility of projects
- Good communication skills
- Ability to meet tight deadlines
- Ability to write reports with clarity
- Good computer skills
- A good understanding of the voluntary sector

Desirable:

- Experience of assessing (including transferable experience)
- An understanding of one or more of the policy areas highlighted below:
 - o 'Lived experience' of being marginalised in economic policy issues and/or of addressing systemic structural inequalities. This means a special focus on those who hold social identities across racialisation, class, gender, disability, age, faith, sexuality, age, class and geographic location.
 - o Non-mainstream perspectives on the economy (e.g. decolonial; ecological; green/recovery; feminist, foundational)
 - o In-depth knowledge about corporate and investor behaviour change (particularly asset management industry, business structures, tax behaviours)
 - o Experience/expertise in local level work, be that from a Local Authority, community coalitions that take on wider projects, or from another funder
 - o Democratising land-based assets, and the link between local economies/communities and land use and national policy

Attributes

Essential:

- Curiosity and willingness to quickly learn about a wide range of areas of the economy
- A commitment to equity and social justice
- Objectivity, fairness and open-mindedness.

How to apply

Applications should be made by 5pm, Friday the 18th June 2021.

Please submit your CV together with a covering letter outlining your experience, your areas of interest/expertise and how you meet the Person Specification to:

FAO: Abigail Gibson -
grants@friendsprovidentfoundation.org.uk

Please provide contact details for 2 referees who have good knowledge of you and your work.

An inception meeting and half-day training will be held in July or August - date to be confirmed.

For further information or an informal discussion, contact Grants Manager, Abigail Gibson by email abigail.gibson@friendsprovidentfoundation.org.uk

Privacy Notice

What we collect and why

When you apply to us for a role you will be providing personal data about yourself, through which you can be identified. We have written this notice to let you know how we will handle and protect your information.

Information which may be collected during a recruitment process, may include:

- Name
- Your work, education and training history
- Contact information including email address, postal address and phone number
- Contact information for your referees
- Any other personal information which you choose to give us relating to your application
- Notes made by staff during the selection process

We require this information in order to review your application, undertake and support the recruitment process, and communicate to you the decisions and outcomes of that process.

The General Data Protection Regulation 2018 (GDPR) sets out that we are required to have a lawful basis for processing your data. In this instance we are processing your data under 'legitimate interests' specifically to support our recruitment process and applicants, as outlined above.

We store this information on our office IT systems, including cloud-based directories and email system, and in paper-based files. We retain information for unsuccessful applicants for a period of 6 months following the completion of the recruitment process, to enable us to provide feedback, address any other queries, or disputes. After a period of 6 months we will delete your data.

For any concerns you have about our use of data, please contact:

Data Protection Lead: enquiries@friendsprovidentfoundation.org.uk or on 01904 629675. You can also contact the Data Protection Regulator, the Information Commissioner's Office (ICO): <https://ico.org.uk/global/contact-us/>