



1 Eastfield Road, Westbury-on-Trym, Bristol BS9 4AD

0117 244 7354

Registered charity number 20592

VISITOR JOB DESCRIPTION

Job Title: Visitor

Reporting to: Charity Secretary

Purpose:

The Bristol Benevolent Institution is a Bristol based charity that has been operating for over 150 years. The objective of the charity is to provide financial grants and interest free loans to people over 60 within the BS postcode area and to help alleviate poverty within the elderly community.

The primary role of the BBI Visitor is a pastoral one, subject to obtaining the necessary information described below with regard to eligibility to become, or continue to be, a beneficiary. Under no circumstances does the role set out to be a professional social worker or financial adviser.

Each Visitor is given a number of Beneficiaries whom they must contact on a regular basis and update their information.

Key tasks:

- New applicants must be visited and application forms completed with all the required information. Visitors must ask to see bank and other financial statements, and obtain full details of income and expenditure with paper work to back this up. At quarterly Trustee meetings, the Visitor will present the applications and answer any questions regarding the visit.
- Visitors are responsible for providing their own mobile telephones and vehicle or suitable mode of transport, with appropriate insurance cover, in which they travel to see the beneficiaries on their list. But all expenses incurred are recoverable.
- Visitors are responsible for keeping good records of all visits and producing details for the Secretary if required.
- Visitors are asked to attend and help with beneficiaries and guests attending any events organised by the BBI; they are also asked to write and send pre-paid, printed cards or newsletters to all beneficiaries on their list. The postage for this is provided by the BBI.
- How and when the Visitors make their visits is for them to arrange. They are encouraged to discuss all aspects with the Secretary from time to time, particularly if they are worried for the welfare of a beneficiary, or if they feel that a beneficiary may be in need of a special grant. The role of Visitor is essentially visiting beneficiaries in their own homes.
- Visitors are expected to attend quarterly Trustee meetings in central Bristol and informal meetings with the Secretary and other Visitors in the North Bristol office.
- Visitors should adhere to the code of practice set out in the Health and Safety Policy and to all the policies included in the employee handbook.

Principle Terms and Conditions:

The role of Visitor is a permanent part-time post working between 7 hours and 21 hours per week – days and precise timings are flexible. As stated above the role is essentially working from home with travel to beneficiaries homes in a given geographical area.

The starting rate of pay is £19.50 per hour, with a six month probation and subject to becoming permanent a work place pension is offered with current employees contributing 4% and 3% from the BBI.

The full-time equivalent annual leave entitlement is 28 days per year including bank holidays, which will be allocated pro-rata.

The role is solely working with elderly and vulnerable adults therefore the successful applicant will be subject to a DBS (Disclosure & Barring Service) check and any unspent convictions should be disclosed.

Person Specification

CRITERIA	STANDARD	Essential / Desirable	
Skills	Excellent interpersonal and communication skills	E	
	Ability to listen	E	
	Ability to read, write and perform calculations to at least a C/4 at GCE O'Level / GCSE in maths and English	E	
	Ability to use a word processor and spreadsheet	E	
	Ability to drive or travel around the City efficiently	E	
	Ability to access private homes via steps	D	
	Ability to use the internet to access information	E	
	Ability to understand and translate financial paperwork	E	
	Knowledge	Knowledge of the Bristol area	D
		Knowledge of safeguarding issues with vulnerable adults	D
Work Experience	Experience of attending and contributing in formal meetings	E	
	Ability to work alone	E	
	Experience of organising and prioritising own workload	E	
	Experience of dealing with the public	D	
	Experience of working within defined values and behaviours framework	D	
Attitude	Willingness to be flexible	E	
	Demonstrates positivity and enthusiasm	E	
	Good organisational skills	E	
	Can demonstrate a non-judgemental and caring attitude	E	
	Willingness to be sympathetic to the needs of others	E	
	Self motivation	D	
	Keeps calm and focused under pressurised and challenging circumstances	E	
	Are reliable and dependable	E	