



## **Terms of Reference**

# **“Freelance Grant Assessor”**

**September  
2019**

## **1.0 Background to the Community Foundation for Northern Ireland**

### **1.1 Vision**

**The Community Foundation for Northern Ireland connects people who care to causes that matter.** For over 40 years the Community Foundation has been a trusted, secure means through which donors choose how, when and where they give, by helping them to set up funds, supporting them to make grants and to see the impact of their donations on local communities in greatest need.

The Community Foundation for Northern Ireland's vision is a peaceful, prosperous, shared and just society; and our mission is to connect people who care to causes that matter. In a society where everyone can prosper and live in peace; we encourage and support those who want to give and empower the local community to effect change.

We're an organisation that provides funding to a vast array of third sector organisations in Northern Ireland, and that means we're perceived as a leader with a strategic oversight of what's happening in our community.

### **1.2 Strategic priorities 2019-2024**

#### **Promotion of Philanthropy**

Beginning with the causes and issues that matter, our team will promote and guide giving in Northern Ireland. Working with individuals, families, businesses and other funders, we will connect networks of like-minded people, important causes and charitable organisations and help to evaluate the effectiveness of giving. Your local centre for philanthropy, we'll share our expertise and provide philanthropy services, training and guidance. Over the next five years, we'll grow new and more funding for the sector, supporting donors to make an impact.

#### **Building Sustainable Communities:**

Local community organisations have untapped potential that could be unlocked by access to more resources, new approaches, relationships, skills and technologies. We are working towards a stronger, resilient and sustainable community sector equipped to face the challenges of tomorrow by unlocking resources and skills, piloting innovative approaches, developing partnerships and encouraging entrepreneurial mindsets.

### **Community Voice and Innovation:**

Everyone has the right to participate in the decisions that affect their lives and shape the society they live in. Public trust in government and politics is extremely low and there are few opportunities for people to influence the decisions that affect their lives – with the right support civil society can change this by reinvigorating civic participation and pushing for deeper democracy.

### **Thriving after the Conflict:**

The conflict in Northern Ireland is still actively affecting the lives of some communities, individuals and families and we will continue to support and deliver a Peace Impact Programme. We believe that some communities are still struggling with the effects of the conflict but have the potential to thrive and we will work to support groups, leaders and potential leaders in those communities to make that happen.

### **People on the Edges:**

We will always look out for those who are caught at the margins of society, in particular the refugee and asylum seeking community, the more vulnerable of the LGBT community, and the travelling community and we will work to support organisations who build capacity in these communities.

## **1.3 Values**

We work together and with others in line with our values - generous, thriving and together.

### **Generosity:**

We encourage generosity in everything we do; we look out for each other; we deal with everyone with compassion, empathy and understanding. We are flexible in how we work with staff, donors and grantees.

### **Thriving:**

We see the potential within both our staff and the communities we work in and are committed to help both reach their full potential.

### **Together:**

We will only make the change we want to see together. We value participation, working with others and bringing people together.

## **2.0 The Role**

**2.1 Role Name:** Freelance Grant Assessor

**2.2 Purpose:** To support the Foundation to assess an increasing number of grants, including community benefit funds, and other new funds, from a wide variety of sources.

### **2.3 Context:**

This is an exciting and important role in the Foundation. The Freelance Grants Assessors will be responsible for assessing applications to the Community Foundation Funds.

The organisation has recently developed and launched a new strategy 2019-2024, as set out above. We currently manage around 65 funds, on behalf of a wide variety of sources, including Nationwide, the Lightbody Foundation, Tampon Tax, and a number of wind farm community benefit funds.

These funds currently generate around 1000+ applications a year, with around 50% approval rate, and all of which require varying levels of assessment.

We are therefore seeking further external support to help us with our grant assessments for a number of our funds, in particular the community benefit funds, and other funds that we currently administer on behalf of others.

## **3.0 Application**

### **3.1 Grant Assessment Support**

The Community Foundation is made up of extraordinarily talented individuals who share a passion for connecting people who care with causes that matter.

We are looking for at least 2 or 3 experienced Freelance Grants Assessors to join the Foundation's Grants Team. The assessors will carry out assessment of the increasing number of grants we are receiving each year. The role is flexible in terms of hours, and will be on a work from home basis, however, there will be some requirement for the Assessors to attend meetings at the Foundation offices at times. Reasonable travel costs will be reimbursed.

The rate of remuneration will be £30 per assessment.

The support will be on ad hoc freelance basis, however, we anticipate that we will have approximately 400-500 applications (approx 30-40 per month) per year to assess among the newly appointed grant assessors.

The assessment may include initial eligibility and due diligence checks for some funds, as well as assessment summaries and recommendations for funds, in line with the fund guidance and criteria, and presentation of panel papers to in house grants panels.

We anticipate appointing at least 2 to 3 experienced assessors, and would expect them to begin working for the Foundation as soon as possible, following training delivered by the Grants Director in October 2019.

Assessments will be carried out using our online Salesforce system. Procedure cards and training on the use of this system will form part of the assessment training delivered in advance.

### **3.2 Requirements**

The support will include:

1. Participating in training with Foundation's Grants Director and team on our funds and assessment process
2. Meetings with key members of staff, in particular the

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Director 3. Review of the Foundation's fund guidance and criteria and other key applicant documents strategy in order to determine eligibility and match to fund criteria and to make recommendations to the Foundation in terms of whether the application is fundable or not. 4. Write up of findings and recommendations following review and assessment

using our Salesforce CRM system.

Please note that appointed Assessors will be required to use their own laptop, which must have up to date anti-virus software installed. We will request evidence of this at the time of appointment to ensure data security.

### **3.3 Delivery Timetable**

The Freelance Grants Assessors will be required to start work as soon as possible, preferably from mid October 2019, following training. The appointment will then be on an ad hoc basis for a period of 12 months, initially, and subject to satisfactory presentation of work. Further contracts will be determined following this 12 month period and in agreement with the Foundation Grants Director. The anticipated timeline for appointment is as follows:

- Initial meeting/call with CFNI to discuss approach during week commencing 14th October 2019.
- First set of assessment details provided week commencing 21st October 2019.
- It is anticipated that there will be some assessments required each calendar month, however, some months will have more demand than others. We anticipate that we would have 30 to 40 assessments per month, with around 10 to 20 per assessor. We anticipate appointing two to three assessors at least.
- Review meeting/call with CFNI will be organised on an ongoing basis to support assessors in their work, or to provide clarity on the assessment process.

### **4.0 Selection Criteria**

Applicants will be selected for their ability to demonstrate their experience in providing high quality and rigorous assessment approaches for grant applications. You should provide evidence of dates and times, and levels of assessment experience, and of whom you have provided this assessment for.

#### **4.1 Pass or Fail Criteria**

- Work undertaken in relation to supporting organisations to assess applications for funding, and presentation of recommendations. Examples within the last 2 years should be drawn upon.
- Confirmation of capacity to deliver the work over the specified timeframe.

The person(s) or organisation appointed will report to the Community Foundation's Grants Director, Orla Black.

#### **5.0 Making a Response and closing date**

You should respond to the invitation by supplying a maximum 2 page proposal, via one electronic copy, sent to [oblack@communityfoundationni.org](mailto:oblack@communityfoundationni.org) by Friday 4th October 2019 at 12pm.

**Please note the maximum budget available for this work is £30 per assessment. Note some assessments will require more detail and time than others, however, the majority of our assessments are relatively straight-forward and do not require anything more than three to four paragraphs in terms of assessor's comments.**

**At times the assessment process will also include review of supporting documentation and eligibility and due diligence checks.**

#### **6.0 Further Information**

Contact: Orla Black, Grants Director

Email: [oblack@communityfoundationni.org](mailto:oblack@communityfoundationni.org)