

Grants Caseworker

Part-time – 21 hours per week (flexible working to be agreed)

Salary: £28,000 – £38,000 FTE (pro-rata to 21 hours per week)

Contract: Permanent

Location: Remote, with occasional meetings or events in central London

Reports to: Chief Executive

Benefits

- 25 days annual leave plus bank holidays (pro-rata)
- 6% employer pension contribution
- Flexible remote working
- Supportive, small team environment

About the BDA Benevolent Fund

The BDA Benevolent Fund is an occupational charity supporting dental students, dentists, asylum-seeking and refugee dentists, and their families across the UK who are experiencing financial hardship or personal crisis.

We provide financial assistance towards essential living costs, alongside practical guidance, advice and signposting to specialist services. Demand for support has grown significantly in recent years, and we are expanding our capacity to ensure applicants receive timely, fair and compassionate support.

The Role

The Grants Caseworker plays a central role in delivering the Charity's mission. You will manage a caseload of applications for financial assistance, ensuring decisions are made fairly, consistently and in line with the Charity's policies and safeguarding framework.

Using a holistic, needs-led approach, you will assess financial and personal circumstances, exercise sound judgement within delegated authority, and contribute directly to positive, sustainable outcomes for members of the dental community.

This is a role for someone who combines empathy with analytical rigour, and who is comfortable balancing compassion with clear, evidence-based decision-making.

Key Responsibilities

1. Application Processing & Triage

- Provide clear and sensitive guidance to applicants throughout the application process.

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- Verify eligibility in accordance with the Charity's criteria and policies.
- Prioritise urgent or high-risk applications appropriately.
- Review applications for completeness and follow up for additional information where required.
- Identify and escalate safeguarding concerns in line with policy.
- Contribute to team-based case prioritisation and urgent payments where necessary.

2. Case Assessment & Grant Decision-Making

- Assess applicants' personal and financial circumstances to ensure fair, consistent and needs-led grant decisions.
- Analyse income, expenditure, debts and other financial information.
- Prepare clear, objective and non-judgemental case summaries and recommendations.
- Make grant decisions within agreed delegated authority, escalating complex or higher-value cases where appropriate.
- Monitor ongoing support and review cases where circumstances change.

3. Advice, Guidance & Signposting

- Provide reassurance and practical guidance throughout the assessment process.
- Identify and signpost applicants to relevant statutory and voluntary sector support.
- Provide information about potential benefit entitlements and routes to specialist advice.
- Liaise appropriately with external agencies, including other benevolent funds and advice services.

4. Safeguarding, Risk & Compliance

- Work within safeguarding and risk-management policies to support individuals with complex or vulnerable needs.
- Record and escalate safeguarding concerns appropriately.
- Maintain strict confidentiality and comply with data protection and GDPR requirements.

5. Records, Data & Systems

- Maintain accurate, detailed and audit-ready case records.
- Log data, financial information and actions consistently within the Charity's database systems.
- Ensure records support reporting, monitoring, impact evaluation and trustee oversight.

6. Impact, Monitoring & Continuous Improvement

- Contribute to the monitoring and evaluation of the Charity's grant-making activity and impact.
- Identify and collate emerging trends, recurring needs or patterns within applications.

- Provide insights to the Chief Executive and Trustees to inform service development and strategic planning.
- Support the continuous improvement of grant processes, guidance materials and applicant communications.
- Contribute to reporting on outcomes, demand and beneficiary needs.

7. Team & Organisational Contribution

- Work collaboratively within a small team, contributing to a flexible and supportive working culture.
- Undertake other duties reasonably required to support the Charity's work.

Person Specification

Essential

- Experience of casework or providing structured support to individuals facing financial or personal hardship (e.g. charity, welfare advice, social care, housing, education, advocacy or similar settings).
- Experience of delivering advice or support primarily via telephone and email.
- Ability to assess complex personal and financial circumstances.
- Ability to exercise sound, evidence-based judgement within delegated authority.
- Strong written communication skills, including drafting clear case summaries and correspondence.
- Organised and methodical, with the ability to manage a varied and sometimes high-pressure workload.
- Caring, compassionate and empathetic, with excellent listening skills.
- Emotional resilience and ability to maintain professional boundaries when supporting individuals in distress.
- Experience of handling sensitive and confidential information appropriately.
- Confidence using databases/CRM systems and Microsoft Office.
- Ability to identify patterns or trends within casework data and contribute to service improvement.
- Ability to work independently while contributing effectively within a small team.

Desirable

- Experience in a grants, benevolent fund or grant-making environment.
- Experience operating with delegated financial authority and preparing cases for senior decision-makers or trustees.
- Working knowledge of UK state and local authority benefits.
- Familiarity with Salesforce.
- Understanding of the dental profession.

Equality, Diversity & Inclusion

The BDA Benevolent Fund is committed to equality, diversity and inclusion. We welcome applications from people of all backgrounds and particularly from those with lived experience of financial hardship or from the communities we support.

How to Apply

Please email your CV and a supporting statement (maximum two pages) to info@bdabenevolentfund.org.uk.

Your supporting statement should outline:

- Why you are a good fit for the role
- How your experience meets the person specification

Deadline for applications: 12pm Friday 13 March 2026

Interviews: To be held via zoom on either 18 or 19 March 2026