

Job description

Grade: 4
Reports to: Casework Manager
Location: UNISON Centre, London NW1

OVERALL SUMMARY:

To provide an effective casework service by maintaining an individual caseload at the required level and standard to ensure the delivery of a responsive, consistent and high-quality service.

KEY RESPONSIBILITIES

Caseworkers have a key role within UNISON Welfare. The post-holder will be required to:

- Consistently manage a demanding caseload in a timely, efficient and effective manner ensuring a quality service and in line with targets and Key Performance Indicators (KPIs).
- Review and assess grant applications analysing information against criteria, interprets financial information, collaborates with welfare volunteers and other professionals and, reaching recommendations on financial assistance.
- Ensure members receive the highest level of service, including:
 - Advice on income maximisation
 - Advice on any additional support which may be available
 - Assisting members in accessing this support or their contact with authorities, welfare providers and other organisations.
 - Advocating and negotiating in consideration of individual circumstances and vulnerability.
 - Co-ordinating applications to other grant giving charities and organisations
- Provide advice and guidance to volunteer branch welfare officers in relation to their role.
- Ensure all communications are personalised, reflective - always demonstrating empathy and understanding of individual circumstances.
- Authorise the payment of crisis and other grants within levels of delegated authority.
- Draw on all available resources to inform the support offered to members.
- Produce clear assessment summaries for internal review or, reports for Trustee decision-making meetings.
- Maintain detailed and accurate case and financial records (paper and electronic) recording data received and actions taken in line with current policies and procedures so that we hold a solid picture of the work we do.
- Maintain confidentiality in all areas of the role in line with procedures and, Data Protection regulations.

- Support the Casework Manager in identifying trends and ongoing development of grant making policy and casework procedures.
- Share team-related tasks including daily case prioritisation, first-line assessment, emergency applications and payments.
- Maintain a comprehensive and up-to-date knowledge of all areas relevant to the role and develop specialist knowledge, as directed.
- Proactively keep abreast of developments within the wider organisation and issues affecting UNISON members.
- Contribute to the volunteer training, development and information programme through:
 - Delivering the welfare officer induction training
 - Planning and/or delivery of presentations and training, as directed.
 - Advising welfare volunteers and others in the organisation on issues such as debt/money management, benefit entitlement, policy as it affects casework and alternative sources of help.
 - Drafting materials such as factsheets and bulletins.
- Identify potentially suitable beneficiary cases that could be used to encourage support and understanding of the charity's work or wider organisation campaigns.
- Collaborate with colleagues to foster a co-operative, flexible and team-working environment.
- Attend meetings, contribute to projects, the development of annual work plans etc., as required
- Participate in training as required to maintain and improve the relevant level of knowledge and skills needed to deliver a quality service.
- Undertake other duties appropriate to the grade and relevant to key tasks and responsibilities of this post.

Person specification & selection criteria

UNISON is an equal opportunities employer, committed to providing equal opportunities regardless of race or ethnic origin, gender identity, family situation, sexual orientation, disability, religion or age. This person specification is designed to help members of Interviewing Panels judge the qualities of interviewees in a systematic and consistent way and in accordance with UNISON's equal opportunities policy. It is given to all job applicants for information.

Assessment code:

A – application form

ST – selection test

PI – panel interview

Selection criteria	Assessment
<p>1. SPECIALIST & TECHNICAL KNOWLEDGE</p> <p>1.1 Substantial experience of working in a welfare-related environment - possibly gained in the voluntary sector, ideally working as a charity grants officer or, as a specialist or generalist advisor.</p> <p>1.2 Must have up to date knowledge of and, the ability to explain these in clear terms (due to the holistic nature of the service, the role will involve giving generalist information and advice across all subject areas):</p> <ul style="list-style-type: none"> • The key principles of income maximisation/debt advice/money management. • Welfare benefits and statutory funding. • The main recovery proceedings used by creditors, the legal implications and strategies for responding. • Ombudsman relevant codes of practice e.g. Financial Services. <p>1.3 Awareness and understanding of the impact that financial hardship can have on individuals and families.</p> <p>1.4 Demonstrable understanding of the need for confidentiality and data protection requirements.</p>	<p>A/PI</p> <p>A/PI/ST</p> <p>A/PI</p> <p>A/PI</p>
<p>2. THINKING</p> <p>2.1 Must be able to develop strategies, solutions and/or plans to solve difficult problems requiring:</p> <ul style="list-style-type: none"> • Highly developed analytical and problem-solving skills • Skills in scrutinising complex information including financial data and asking probing questions where needed • Identifying other organisations that can help and working with them when appropriate. • Experience of taking responsibility for recommendations and decision-making. 	<p>A/PI/ST</p>
<p>3. INTERPERSONAL & COMMUNICATION</p> <p>3.1 Must have highly developed communication skills including, discretion and capacity to deal with people experiencing traumatic or difficult circumstances efficiently and effectively and/or from different cultural backgrounds to include:</p> <ul style="list-style-type: none"> • Giving advice, information and guidance. • Skilled in providing telephone support responding calmly, sensitively and positively to people who may present a range of emotions. • Ability to produce concise written reports, comprehensive case records and high-quality correspondence. <p>3.2 Proven experience in advocacy, representation and negotiation.</p> <p>3.3 Experienced in giving presentations and the confidence and ability to train our volunteers.</p> <p>3.4 Ability to work effectively and accurately within the administrative arrangements and timetables set; ensuring that files and records (paper and electronic) are properly maintained.</p>	<p>A/PI/ST</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI</p>

<p>10. INITIATIVE & INDEPENDENCE</p> <p>4.1 Must be able to work both on a self-motivated basis and collaboratively within the team and with other staff.</p> <p>4.2 Must be able prioritise work under pressure ensuring targets and service standards are consistently met.</p> <p>4.3 Must understand the importance of, and adhere to, the charity's policies and procedures.</p>	<p>A/PI</p> <p>A/PI</p> <p>A/PI</p>
<p>11. RESOURCE MANAGEMENT</p> <p>5.1 Ability to produce resource and information materials such as factsheets, briefings etc. relevant to the work.</p> <p>5.2 Ability to work within financial limits and organise grant payments.</p> <p>5.3 Excellent time management and organisational skills</p>	<p>A/PI</p> <p>A/PI</p> <p>A/PI</p>
<p>12. PHYSICAL SKILLS (with modification where necessary)</p> <p>6.1 IT skills (such as word processing, email, powerpoint etc.).</p> <p>6.2 Experienced in using databases including case management software.</p>	<p>A/PI</p> <p>A/PI</p>
<p>13. GENERAL KNOWLEDGE & OTHER</p> <p>7.1 Commitment to professionalism at all times.</p> <p>7.2 Willingness to work flexibly which may involve occasional travel and evenings away.</p> <p>7.3 A commitment to personal development including keeping up to date on all subject areas relevant to the role.</p> <p>7.4 Commitment to upholding the missions and values of the charity and the wider union.</p> <p>7.5 Understanding of, and commitment to, the principles of equality and fairness.</p>	<p>A/PI</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI</p>