

UNISON

Caseworker UNISON Welfare Regional Management & Governance Directorate Ref: RMG/9

JOB BRIEF

Introduction

UNISON is UK's leading public sector trade union, with over 1.3 million members working in public services, private, voluntary and community sectors and in the energy services. We employ 1200 staff, of whom about 370 are based at our national centre in Euston, central London. The remainder work in our twelve regions across the UK, including Northern Ireland.

Welfare services are provided through UNISON Welfare, a registered charity which has its own rules and constitution and has to conform to charity law. The charity is run by a Board of Trustees and staff who work for the charity are employed under UNISON Terms and Conditions.

UNISON Welfare currently employs 9 staff. There is a casework team of four which includes the team leader who provides day to day support.

The working name of UNISON Welfare is 'There for you'.

About UNISON Welfare

The 'Objects' of UNISON Welfare are detailed in our Constitution and Rules however our primary aim is to provide services that can support members and their families at times of unforeseen hardship and personal difficulty. It is a unique organisation providing invaluable assistance to members in need who may otherwise have nowhere else to turn.

Help is provided through a network of members who volunteer personal time so that this service can be provided and is managed by paid officers.

The service itself can be broadly categorised under the following headings:

- Listening and support
- Financial assistance
- Wellbeing breaks
- Advice and information
- Debt advice service

Our work is structured around a number of key objectives and priorities which are determined by the Board of Trustees. Our mission is to:

- Be an invaluable resource for UNISON's membership
- Provide high quality welfare services including advice and assistance to UNISON's membership
- Offer financial assistance to all members and their dependants who may be experiencing financial hardship and who meet the criteria.

The role

For this position, you will most likely have experience of supporting people through times of crisis gained in an advisory capacity or similar casework role either working for another charity, voluntary or public sector organisation that has similar aims and values.

You will be required to manage a large number of grant applications, which are allocated weekly and, be able to cope well under pressure. Self-motivated and with a can-do approach, you will have a key role in making a significant difference to the lives of UNISON members who are struggling in their personal lives.

In addition to being an experienced and tactful communicator, you will be skilled in building relationships over the phone and confident in supporting people who have complex problems and identifying what the main issues are. Able to demonstrate empathy and judgement whilst at the same time meeting targets and service standards, key elements of this role include:

- Managing an individual caseload
- Holistically assessing grant applications
- Consistently delivering a high quality standard of advice, support, and information.
- Helping people find ways to increase their income and save money, including signposting or making referrals to specialist advice and support services.
- Making recommendations or taking decisions on financial assistance within agreed guidelines
- Contact with other organisations such as charities, statutory bodies and creditors involving advocacy, negotiation and co-ordinating applications to secure additional funding as appropriate

You may also be required to develop areas of specialism such as taking responsibility for specific regions especially where, as a result of increased devolution, there are distinct differences in areas such as social policy. In this situation, training would be provided.

Candidates will be able to demonstrate the ability to organise their work effectively, prioritise activities and, have a strong understanding of, and commitment to, providing quality services.

You will be confident in your ability to run occasional training courses for our volunteers and give presentations which may require travel and overnight stay. UNISON is a strong supporter of the work/life balance ethos and staff will take time off in lieu of work outside the normal working week. There is also a flexible working policy in place.

As a small team of staff, we are particularly interested in candidates who have a flexible and adaptable approach to their work and are willing to support colleagues when needed as this will ensure that the charity can continue to go from strength to strength.

If you enjoy helping people and would like to work as part of a team dedicated to providing an excellent service, this could be the role for you.

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**Caseworker
UNISON Welfare
Regional Management & Governance Directorate
Ref: RMG/9**

JOB DESCRIPTION

Grade: 4

Hours: 35 per week

Location: UNISON Centre, London NW1

Reports to: Casework Team Leader

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 to include:
 - 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 and cases they are dealing with.
- Ensure all communications are personalized, 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 Team Leader in identifying trends and ongoing development of grant making policy and casework procedures.
- Share in team related tasks including daily case prioritization, first line assessment, emergency applications and payments and, bank transactions.
- Maintain a comprehensive and up-to-date knowledge of all areas relevant to the role and develop specialist knowledge related to the role as directed
- Proactively keep abreast of developments within the wider organization and issues affecting UNISON members.
- Contribute to the Volunteer Training, Development and information Programme through:
 - Delivering the welfare officer induction training and, the planning or delivery of other presentations, 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 fact-sheets and bulletins.
- Identify potentially suitable beneficiary cases that could be used to encourage support and understanding of the charity's work or wider organization 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.

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PERSON SPECIFICATION

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

Heading	Selection criteria	Assessment
1. Specialist & Technical Knowledge	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.	A/PI
	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): <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	A/PI/ST

	<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</p>
2. Thinking	<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. 	A/PI/ST
3. Interpersonal & Communication	<p>3.1 Must have highly developed communication skills including, discretion and capacity to deal efficiently, and effectively with people experiencing traumatic or difficult circumstances 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 • Writing skills – ability to produce concise 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</p>	<p>A/PI/ST</p> <p>A/PI</p> <p>A/PI/ST</p> <p>A/PI</p>

	set ensuring that files and records (paper and electronic) are properly maintained.	
4. Initiative & Independence	4.1 Must be able to work both on a self-motivated basis and collaboratively within the team and with other staff.	A/PI
	4.2 Must be able prioritise work under pressure ensuring targets and service standards are consistently met.	A/PI
	4.3 Must understand the importance of and, adhere to, the charity's policies and procedures.	A/PI
5. Resource Management	5.1 Ability to produce resource and information materials such as factsheets, briefings etc relevant to the work.	A/PI
	5.2 Ability to work within financial limits and organise grant payments.	A/PI
	5.3 Excellent time management and organisational skills	A/PI
6. Physical Skills (with modification where necessary)	6.1 IT skills (such as word processing, email, PowerPoint etc)	A/PI
	6.2 Experienced in using databases including case management software	A/PI
7. General Knowledge & Other	7.1 Commitment to professionalism at all times	A/PI
	7.2 Willingness to work flexibly which may involve occasional travel and evenings away	A/PI
	7.3 A commitment to personal development including keeping up to date on all subject areas relevant to the role.	A/PI
	7.4 Commitment to upholding the mission and values of the charity and the wider union.	A/PI
	7.5 Understanding of and, commitment to, the principles of equality and fairness	A/PI

Other Information

Please submit **three** copies of your completed application form.

Completed application forms must be received by no later than **5pm on Friday 07 April 2017**.

Shortlisted candidates will be invited for a selection test on 19 April 2017 and interviews will take place on 20 April 2017.