

UNISON
Casework Manager
UNISON Welfare There for You
Ref: RMG/7

JOB DESCRIPTION

Grade: 3

Hours: 35 per week

Location: UNISON Centre, London

Reports to: Head of Welfare

Responsible for: Caseworkers x 3, Assistant Caseworkers x 2

Main purpose of job

To contribute to the overall management and development of Unison Welfare, by co-ordinating and delivering an effective, consistent and efficient grant making and grant management operation to ensure service standards, criteria and budgetary requirements are met in line with our external regulatory requirements and our internal policies and procedures.

Key areas

- Play a lead role in the development and implementation of grant making strategy and policy.
- Responsible for the operational management of the grant making process ensuring that it is efficient and effective, and that the charity maximises the help it gives to UNISON members.
- Manage and support a team of caseworkers and assistant caseworkers.
- Maintain excellent relationships with Trustees, Unison members and other contacts through effective communication and delivery of service standards.
- Deputise for the Head of Welfare in their absence

Key tasks and responsibilities

Specialist

- Overall responsibility for reviewing and maintaining the charity's CRM database ensuring every potential to streamline workflow, administrative and reporting processes is maximised.
- Monitor and review case management protocols to maintain quality standards – identifying and implementing new ways of working where needed.
- Maintain up to date knowledge on factors that could impact casework e.g., benefits, debt management, health, political etc providing advice or producing reports as required to Head of Welfare, Board of Trustees and other stakeholders.

Managerial

- Oversee the awarding of individual grants, the provision of benefits and income maximisation advice. Review and authorise applications from Caseworkers up to level of delegated financial authority.
- Line-manage caseworkers and assistant caseworkers through supervision, performance management, development review meetings and training ensuring team are fully engaged, appropriately skilled and supported in their work.
- Recruit, select, and performance manage staff in accordance with HR Policies, seeking advice/support from HR as appropriate.
- Monitor and report on performance to the Head of Welfare.
- Contribute to the overall strategic planning and developing of annual work programme.
- Involvement in the budget setting process including preparing the annual budget for grant giving expenditure, monitoring and approving all expenditure as it relates to the casework function in accordance with financial procedures.

- Keep under review programmes of assistance; identify, develop, implement new initiatives as required.
- Be the main point of contact with other charity grant making organisations with responsibility for developing mutually beneficial working arrangements.
- Responsible for managing all matters relating to safeguarding.
- Manage through to resolution, member complaints and data protection issues as they relate to casework seeking advice as needed to ensure compliance with the law.
- Assist the Head of Welfare on other projects and tasks as appropriate.
- Deputise for the Head of Welfare in their absence.

Administration and Operational Management

- Overall responsibility for the grant making process from receipt through to conclusion, so that requests are managed efficiently and effectively ensuring high levels of customer care including advice or signposting e.g., to other support services, benefit entitlement.
- Develop new working methods to take account of fluctuating workload.
- Conduct case management and file reviews with team members.
- Manage own caseload, to include dealing with escalated and more complex cases.
- Approve grants within delegated financial limits.
- Ensure team comply with all organisational policies and procedures.
- Lead on the development and updating of policy changes in relation to financial assistance together with updating casework documented procedures.
- Allocate work and deploy resources taking account of fluctuating applications, staff availability and according to overall priorities.
- Responsible for the maintenance and management of the grants database

Volunteer Training & Information

- Maintain the Branch Welfare Officer handbook and produce new resource material as required.
- In liaison with Unison's Learning & Organising Unit lead on the development on branch welfare officer training and development.

Communications & Co-ordination

- Present reports to the Board of Trustees and Head of Welfare as required ensuring all remain fully updated about casework activities, the success of agreed targets, trends, including analysis of relevant statistics.
- Meet with Support Staff Team Leader and/or Head of Welfare on a regular basis so that changes to working practices that deliver efficiencies and service improvements are discussed.
- Prepare and deliver presentations as required on the work of the charity
- Ensure positive relations with our partner debt advice service through updates on changes to grants policy and involvement in service review meetings as required.
- Contribute to internal and external communications providing updates on matters relating to grants, service developments and branch welfare officer training.
- Develop user-friendly financial assistance application forms (online and paper) collecting only data that is necessary.

Other

- Occasional weekend and evening working required.
- To be alert to opportunities to promote and develop the service
- Undertake any other duties and develop initiatives appropriate to the grade and relevant to the key tasks and responsibilities identified above.

PERSON SPECIFICATION
Casework Manager: Grade 3

UNISON is an equal opportunities employer, committed to providing equal opportunities regardless of race, marital status, gender, sexuality, disablement, or age. This Person Specification is designed to help members of the Interviewing Panel judge the qualities of the 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

PI – PANEL INTERVIEW

ST – SELECTION TEST

Heading	Selection criteria	Assessment
Specialist & technical	<ul style="list-style-type: none"> ▪ Experience of operating at management level ideally in a similar setting. ▪ Knowledge and understanding of the principles of effective grant making. ▪ Track record of successful casework gained in a similar setting including management of varied and complex cases. ▪ Up to date knowledge of: <ul style="list-style-type: none"> ▪ Welfare benefits and statutory funding. ▪ Voluntary, advice, charity sector ▪ Key principles of income maximisation/debt advice/money management ▪ Main recovery proceedings used by creditors, legal implications and strategies for responding. ▪ The impact financial hardship can have on individuals and families. ▪ Strong understanding of broad social issues and an awareness of government social policy ▪ Experience of database development and maintenance. ▪ Project management skills ▪ Experience of and ability to lead on safeguarding. ▪ Best practice experience in the management of confidential and personal information. Ability and confidence to resolve Data Protection issues should they arise. 	<p>A/PI/ST</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI/ST</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI</p> <p>A/PI</p>
Thinking	<ul style="list-style-type: none"> ▪ Ability to initiate, plan, develop and manage service delivery ideally gained in a similar role. ▪ Experience of taking responsibility for making prompt, clear decisions. ▪ Excellent analytical skills including the ability to analyse complex information. ▪ Ability to contribute to the development of strategic objectives and produce team annual work plan. ▪ Ability to develop solutions or plans to solve difficult problems and apply to a casework and staff management environment. 	<p>A/PI</p> <p>A/PI</p> <p>A/PI/ST</p> <p>A/PI</p> <p>A/PI/ST</p>

Interpersonal & communication	<ul style="list-style-type: none"> ▪ Highly developed interpersonal skills including: <ul style="list-style-type: none"> ▪ Team leadership and ability to motivate. ▪ Ability to work with senior management ▪ Mentoring, coaching and staff performance ▪ Handling complaints ▪ Negotiation and advice giving 	A/PI
	<ul style="list-style-type: none"> ▪ Experience of working in partnership with external service providers. 	A/PI
	<ul style="list-style-type: none"> ▪ Experienced in supporting those facing traumatic or difficult circumstances 	A/PI
	<ul style="list-style-type: none"> ▪ Ability to co-ordinate tasks to deadlines and competing priorities ensuring targets and service standards are consistently met. 	A/PI
	<ul style="list-style-type: none"> ▪ Highly developed communication skills including report writing, facilitation and presentation skills. 	A/PI
Initiative & independence	<ul style="list-style-type: none"> • Track record of using initiative and independence over a broad area of activity involving decision making and implementation. 	A/PI
	<ul style="list-style-type: none"> • Self-motivated and aware of own role in maintaining morale where work can be emotionally demanding. 	A/PI
	<ul style="list-style-type: none"> • Comfortable working under pressure and to tight timescales. 	A/PI
Staff & resource management	<ul style="list-style-type: none"> ▪ Experienced in managing staff in a pressured and emotionally demanding environment including: <ul style="list-style-type: none"> - Delegating and supervising work. - Coaching and mentoring - Setting clear objectives/work plans - Ensuring targets and service standards are consistently met. - Identifying training and development needs. 	A/PI
	<ul style="list-style-type: none"> ▪ A creative and strategic approach to problem solving. 	A/PI
	<ul style="list-style-type: none"> ▪ Experienced in delivering results ensuring a high standard of service delivery both in terms of quantity and quality. 	A/PI
	<ul style="list-style-type: none"> ▪ Experience of working to financial procedures including involvement in budget setting/monitoring. (The grants budget is in excess of £500,000.) 	A/PI
Physical skills (with DDA modification if necessary)	<ul style="list-style-type: none"> • IT skills (such as word processing, email, PowerPoint etc) 	A/PI
	<ul style="list-style-type: none"> • Experienced in using databases including case management software 	A/PI
General knowledge	<ul style="list-style-type: none"> ▪ An appreciation of the stakeholder nature of Unison Welfare and Unison. 	A/PI
	<ul style="list-style-type: none"> ▪ Comprehensive knowledge of ICT packages including Microsoft Office suite. 	A/PI