

Role Profile

Role	Caseworker	
Job family	Service Delivery	
Reporting to	Casework Team Manager	
Salary / Grade	£27,176.34 - £30,195.93 (1 FTE)	
Hours	Full time (37 hours)	
Location	<p>Guildford, Godalming and Farnham - with travel to other locations expected as needed</p> <p>Flexibility for some remote working dependent on service and client need as agreed between teams</p>	<p>Level of travel:</p> <p>Medium</p>
Team overview	The CASWS Service Delivery team is structured to reflect the different levels of advice and delivery across the organisation, ranging from information to full casework.	
Role purpose	To deliver up to casework level support to agreed standards	
Functional responsibilities / competencies	Key elements/Tasks	% of Time
<p>Service Delivery</p> <p>– take responsibility for the delivery of casework level services in CASWS locations and remotely.</p>	<ul style="list-style-type: none"> Accept referrals and undertake delivery of casework to progress clients to achieve the right outcomes, in line with relevant contracts and projects. <ul style="list-style-type: none"> Meet funder targets and requirements. Explore clients' issues and circumstances in enough detail to work out next steps, including: <ul style="list-style-type: none"> identifying key dates and time limits relating to client's issues reviewing case records and referrals accurately and objectively, ahead of appointments where the client is a returning client explore and understand client capability to tailor your support Explain and obtain consent for referral for partner agencies and what will happen Provide casework to relevant standards, covering the full range of issues on debt, welfare benefits and housing, depending on relevant project requirements, including: 	<p>50%</p>

	<ul style="list-style-type: none"> • Using AdviserNet, other valid and/or trusted adviser resources, and relevant legislation to research, analyse and correctly interpret information and identify possible options appropriate to the client's circumstances. • Assess client's capability to agree appropriate next steps to progress their case and achieve the right outcome. • Deliver casework and advice through face to face, telephone or digital channels, according to client need and preference. • Correctly identify and agree next steps with clients and who is doing what within appropriate timescales, including giving practical help where appropriate • Negotiate and advocate on behalf of the client to achieve desired outcome (where appropriate) including: <ul style="list-style-type: none"> • Developing relationships with relevant local service providers to act on behalf of the client effectively • Taking responsibility for actions on behalf of a client • Prepare cases for representation in court or a tribunal • Represent clients at tribunals and other review, appeal or proceedings, using the approach and tactics most likely to achieve best possible outcome (where applicable) • Negotiating with creditors on a client's behalf • Assessing the best strategies and options to support clients' debt issues whilst providing budgeting advice and looking at ways to maximise income. • You will provide a holistic advice service and facilitate clients to access support in any other areas of advice which they need. • Effectively consult with the Advice Supervisor, Casework Team Manager, other relevant supervisors, in-house specialist, Expert Advice Team or external specialists as appropriate • Make internal and external referrals • Ensure compliance with relevant standards, including Money and Pension Service, FCA requirements and Citizens Advice Quality of Advice standards. • Effectively manage and prioritise caseload, keeping clients informed of progress, alerting your line manager to any barriers to effective working and use casework to support the advice service (to maintain and improve standards) including: 	
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	<ul style="list-style-type: none"> • Making effective use of planning tools and regularly review outstanding casework to prioritise workload • Engaging in Quality of Advice Assessment (QAA) processes, including file reviews, reflect on the evaluations and feedback given, and seek to continuously improve the quality of advice given to clients • Gather feedback on the service provided • Support our research and campaigns work, including submitting evidence forms. 	
Use client management system - to accurately record client interactions and meet service and funder requirements	<ul style="list-style-type: none"> • Find existing clients, update client records, permissions/consent, or create a new client on Casebook • Understand the Quality of Advice Assessment (QAA) process and adds case notes to client records that meet the quality standards (including using Advice Issue Codes (AICs)) • Use the system to book appointments, add tasks and/or refer to other local Citizens Advice. • Obtain and record client consent for referrals to external agencies, and authority to act, and attach documents to case record • Record client outcomes • Contribute to/write reports relevant to the role • Provide required data, case recording and information to support contract requirements, including case studies. 	35%
Team – work as part of a wider caseworker and organisational team	<ul style="list-style-type: none"> • Participate in organisational initiatives to develop and improve services. • Prepare for and attend supervision sessions and other meetings with your line manager as appropriate. • Maintain good working relationships with the wider casework and service delivery team, participating and contributing to caseworker meetings. • Take part in team and peer support activities. • Work with volunteer caseworkers where agreed, delegating and supporting where appropriate to delivery. • Work with the Service Delivery Assistant to ensure a smooth client journey from initial contact to close of case. • Contribute to a positive working environment in which equality and diversity are well-managed, dignity at work is upheld and team members are motivated to do their best. 	10%
Other	<ul style="list-style-type: none"> • Develop and maintain working relationships with other professionals and stakeholder working with our client groups, including representing the service at meetings 	5%

	<p>with other agencies and delivering information sessions as appropriate.</p> <ul style="list-style-type: none"> • Promote the service to client and stakeholders • Keep up to date with legislation, caselaw, policies and procedures. • Undertake appropriate training and activities to maintain standards. • Manage your own day to day activities to deliver tasks on time and to the required standard while gaining experience and expertise in support. • Deputise for the Casework Team Manager from time to time. • Undertake other duties as may be reasonably required within the scope of the role. 	
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Person Specification

Essential criteria

1. **Organised, proactive and self-motivated, with the ability to identify barriers to success and know when to seek help in resolving them.**
2. **Thorough understanding of the relevant advice topics, including debt, benefits and housing, with the ability to work with clients on a range of solutions, working to relevant Advice Quality Standards.**
3. **Excellent communication skills - face to face, in writing and over the phone, with the ability to use sensitive listening and questioning to get to the root of the issues and empower clients, whilst maintaining structure and control of meetings with them.**
4. Excellent organisational and administrative skills, including the ability to write accurately and concisely in a timely manner, with good literacy and numeracy skills relevant to the role.
5. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
6. Ability to prioritise own work, meet deadlines and manage workload in a busy environment with competing demands.
7. A commitment to continuous professional development, including a willingness to develop knowledge and skills to carry out the role.
8. A willingness to work with people from diverse backgrounds, whilst giving advice in a non-judgemental way.
9. Ability to work independently, and away from the office.
10. Proficient in use of digital systems, including case management, remote working, and Office 365 applications, and the ability to use required management systems, tools and processes for the purposes of the role.

Items in **bold** will be given higher priority in recruitment process

Requirements for role

1. Work within our organisational key principles - *you are able to work within our key principles to deliver a service that is Confidential, Free, Impartial and Independent*
2. Embed Equity, Diversity and Inclusion (EDI) in day to day work- *You understand the policies and approach to Equity, Diversity and Inclusion, and are able to use this knowledge to create and support an equitable, diverse and inclusive service and office*

3. Provide a service that meets legal and regulatory requirements and understand the purpose of quality assurance systems - *You understand the legal and regulatory requirements that apply to your role and know what to do to ensure they're met*
4. Use systems relevant to the role - *You have the digital skills needed to use the tools, software and platforms relevant to your role.*
5. Describe the range of services provided across the organisation - *You understand that Citizens Advice services are national and local, across England and Wales, and know what the different parts of the service do, both in your office and wider organisation.*
6. Be collaborative, supportive, inclusive and have integrity - *You contribute towards a safe, positive and inclusive working environment where everyone can be themselves*
7. Work constructively with others, individual and as teams - *You are able to work by yourself, with others and in teams, effectively, productively and constructively*
8. Personal Development - *You contribute proactively to the assessment of your role and team and work to continually improve*