



GUILDFORD
B O R O U G H

**Resources Casework Apprentice,
Resources Caseworker
&
Resources Case Team Leader**



Job Title	Resources Caseworker Resources Case Team Leader
Service Area	Resources
Grade	Casework apprentice – Grade 1 Caseworker L1 – Grade 2 Caseworker L2 – Grade 3 Caseworker L3 – Grade 4 Caseworker L4 – Grade 5 Resources Case Team Leader L1 – Grade 6 Resources Case Team Leader L2 – Grade 7
Job Reference	FG19-RD06

Reporting to	Responsible for
Resources Caseworker reports to Resources Case Team Leader	Not applicable
Resources Case Team Leader reports to Resources Case Manager	Resources Case Team Leader responsible for Resources Caseworkers

Team Purpose
To support and enable teams across the council to deliver quality services for customers by providing excellent support services.

Role Purpose
<p>Resources Caseworker & Apprentice:</p> <p>Working on a professional and integrated case management basis, the postholder will respond to, and seek to resolve support services requests from internal customers using the systems, processes and workflows in place. Resources Caseworkers must ensure attention to detail, accuracy and customer focus to enable the highest possible standards of support and advice to resolve requests. Cases will cover the full and wide range of business support services.</p> <p>Resources Casework Team Leader:</p> <p>The postholder will support the Resources Case Manager in managing the teams to ensure work processes, standards and compliance are completed efficiently and effectively and continuously improved. Manage workflow and ensure cases are resolved as quickly and efficiently as possible.</p>



Undertake quality checking of work, providing training and support as required. Maintain performance standards as agreed in conjunction with the Resources Case Manager and address any performance issues as they arise quickly and in accordance with policies.

Key Accountabilities

Apprentice:

- Support straight forward tasks that require some understanding of relevant service processes, regulations and legislation.
- Will regularly refer to Team Leaders for advice and guidance.
- No requirement to work with Specialists

Level 1:

- Ensuring accurate, professional and timely case management business support is provided to internal customers that supports the council's business needs
- Ensure policies, procedures and workflows for dealing with all support services requests are adhered to
- Assist in ensuring the provision of fit for purpose support services systems and processes
- Ensure strict confidentiality is maintained and data protection rules followed
- Promote knowledge and understanding of case management processes and systems across the council
- Identify improvements in customer and service provision
- Undertake straightforward clerical tasks that require understanding of relevant service processes, regulations and legislation
- Will regularly refer to Business Partner for advice and guidance (business partnering roles delivered by Resources Case Manager and Resources Specialist Services Manager)
- Requirement to refer to Resources Specialists for case resolution
- Undertake straightforward cases that will require some understanding of relevant service processes and compliance, regulations and legislation

Level 2 (in addition to the above):

- Undertake straight forward cases that will require a good level of understanding of relevant service processes and compliance, regulations and legislation.
- Will regularly refer to Team Leaders for advice and guidance.
- Some requirement to refer to Specialists for case resolution.

Level 3 (in addition to the above)

- Undertake more complex cases that will require a more detailed understanding of relevant service processes and compliance, regulations and legislation.
- Train, induct and mentor new staff in case management process in a specific area.
- Will occasionally refer to the Team Leader for advice and guidance.
- Requirement to refer to Specialists for case resolution, having a good understanding of the handoff points between Customer Services and Specialist Services.



Level 4 (in addition to the above):

- To demonstrate significant depth or breadth in case ownership through one of the following:
 - Acting as lead case owner in one area of specialism, personally owning the resolution of some complex cases, and assisting with the design and development of tools and guidance notes which enable the team to self-serve and widen their knowledge, **or**;
 - Developing a breadth of knowledge, owning non-complex cases across multiple services where significant functional knowledge and skills are required
- Will occasionally refer to Team Leader for advice and guidance
- Some requirement to work with Resources Specialists

Team Leader (in addition to the above):

- Undertake a broader range of complex cases that will require very good understanding of relevant service processes and compliance, regulations and legislation
- Have responsibility for specific areas working with Resources Specialists (e.g. Payroll)
- Will be able to act without referring to Business Partner
- Train, induct and mentor new staff in Resources Case Management process in multiple areas
- Little or no requirement to refer to Resources Specialists for case resolution

Appointment and progression through grades will be based on the needs of the business.

Key Objectives	
Working with customers	Develop and maintain relationships with customers, interacting through multiple channels. Develop and implement plans to facilitate customer engagement. Proactively market the benefits of digital and self-service channels to all customers, taking forward customer enabling opportunities.
Working towards the Corporate Plan	Responsible for delivery of agreed objectives and services associated with the Corporate Plan.
Knowledge of services	Excellent understanding of the support services provided across the council and a good knowledge of the terminology and acronyms used by the services.
Using systems effectively	Excellent IT skills and highly developed skills in a number of Resources systems. Ability to learn new systems quickly.

Specific Tasks	
Case Management skills	Working efficiently, professionally, paying attention to detail and following workflows when processing cases. Effective case management including handling related cases for a single customer, assessing risk, identifying potential fraud and working on more complex cases in conjunction with



Specific Tasks	
	Specialists (progression & higher level). Ensure outcomes meet legislative and professional standards.
Team work and working with others	Support, inform and guide customers new to the case management approach building understanding and confidence. Work collaboratively with colleagues to improve customer service, highlight opportunities for empowering customers further and participate in multi departmental project teams.
Enquiries, reports and service requests	Manage customer interactions promptly and effectively, establishing the nature of the enquiry and then taking action or referring to another team where appropriate. Knowing when to consult with or pass cases over to Resources Specialists. Supporting customer self-serve by observing peaks or trends in interaction types and spotting opportunities to initiate further enabling and self-serve processes. This could involve championing own ideas, participating in multi departmental teams or project teams. Processing reports, responding to information requests, having a deep knowledge of the data required.
Processing and administration	Able to identify and develop opportunities for improving workflow/process and/or increasing customer self-serve or enabling; working on cases that require problem solving with customers. Access and accurately update all relevant information systems, both customer and back office, ensuring that data is updated and maintained through verification, and validation, and in accordance with Data Protection principles.
Strategy and policy	Provide input into corporate strategy, policy and programmes as required (progression & higher level)
Performance	Working towards achieving the KPIs set by the Resources Casework Manager.
Performance	Lead, develop and manage the team's performance and quality control KPI's to ensure service delivery targets are met within budget. Promote an organisational culture that empowers and motivates staff and achieves good communication, positive employee relations and effective employee development. Provide staffs with positive leadership, guidance, coaching, direction and motivation that harnesses the strengths and talents of individuals, achieves their maximum contribution to the organisation



Specific Tasks

and promotes their personal development.

Qualifications

Level 1: Minimum of GCSE pass in English & Maths, or equivalent experience.

Level 2: Good standard of education with a minimum of 5 GCSEs or equivalent experience.

Level 3: Educated to NVQ level 3 / A Level standard or equivalent experience.

Level 4: Educated to NVQ level 3 / A Level standard with relevant experience.

Team Leader: Educated to NVQ level 3 / A Level standard or significant experience. Professional business qualification (desirable). Part qualified in a specialist service qualification or working towards this (desirable).

Knowledge, Skills and Experience



Apprentice:

- Some understanding of internal customer focused role
- Understanding of requirement to respond to requests from other members of the casework team and when to request support
- Understanding of the importance to be accurate, detailed and professional in approach to work
- Understands and can exercise the concept of good customer service

Level 1:

- Understanding of customer focused, service delivery role
- Proven ability to analyse and respond to requests and understanding when to escalate a case.
- Proven ability to be accurate, detailed and professional in approach to work.
- Proven ability to deliver high standards and good customer service.
- Strong ICT skills and proven ability to learn new systems quickly.

Level 2 (in addition to the above):

- Some experience of working in a customer focused, support service role and good admin skills
- An understanding of the relevant legislation and regulations applied to area of service delivery
- Proven ability to analyse and respond to requests and understanding when to escalate a case
- Proven ability to be accurate, detailed and professional in approach to work
- Proven ability to deliver high standards and good customer service
- Strong ICT skills and proven ability to learn new systems quickly

Level 3 (in addition to the above):

- Some experience (minimum 1 year) in working in a customer focused, support service role
- Proven ability to understand and comply with legislation and regulations in day to day business
- Solid understanding of case management approach and experience of dealing with more complex cases and providing multi-disciplinary support

Level 4 (in addition to the above):

- Extensive experience (minimum 2 years) in working in a customer focused, support service role
- Demonstrable ability to understand and comply with legislation and regulations in day to day business
- Demonstrable understanding of case management approach and experience of dealing with more complex cases and providing multi-disciplinary support

Team Leader (in addition to the above):

- Proven ability to lead a team with experience in all aspects of people management including effectively manage performance, setting targets and dealing with issues as they arise
- Experience in setting, maintaining and monitoring standards of accuracy, diligence and service delivery
- Experience in selection and recruitment



Specialist Knowledge

Depending on the level and nature of the work undertaken some postholders may be required to hold technical/specific qualifications.

Special Requirements

Emergency Planning	This post will be on occasions required to take part in the council's emergency planning training, and may be called upon in the case of such an emergency. Where necessary this will include unsociable hours.
Election Duties	This post will, on occasion and with reasonable notice, be expected to assist with election duties as required and this will include working unsociable hours. A separate payment for election duties will be made as determined by the regional Elections Committee.

Standard Terms

1. To comply with appropriate legislation, service and council policies.
2. All employees have responsibility under the Health and Safety at Work, etc. Act 1974. These responsibilities are laid out in the council's health and safety policy and procedures.
3. To support and be committed to the council's policy on safeguarding and promoting the welfare of vulnerable groups including, young children and adults and expects all staff and volunteers to share this commitment.
4. To support the council's equalities and diversity policies.
5. To operate within the council's IT policies and data protection rules and regulations.
6. To operate within the council's financial regulations.
7. Manage budgets and resources ensuring that they are deployed effectively with robust internal controls and compliance with relevant regulations, policies and guidelines.
8. To participate in internal committees and departmental working parties to ensure continuous improvement as required.
9. Any other reasonable duties as may be required from time to time

Competency Framework

Central to the delivery of the role are the council's values and behaviours and all employees are expected to work within the council's Organisational Culture Framework. These are shared by all employees and applied to everything we do. The points for each competency are shown below:



Guildford behaviours [competencies]: see the framework in the Performance Review Toolkit for a full list behavioural indicators	
Core Competencies - All Workforce	
Embraces Change	Has a positive attitude to change, adapts to meet new challenges, and introduces changes to improve organisational performance.
Innovation and creative thinking	Proactively generates and develops innovative ideas, opportunities or improvements in order to meet organisational objectives more efficiently and effectively
Effective communication	Communicates effectively. Uses communication methods and standards, together with well-reasoned arguments to convince and persuade where necessary.
Customer focus	Puts the customer first, builds effective relationships and seeks feedback to address their needs.
Problem solving & decision making	Understands and analyses issues in order to identify the most appropriate solutions. Makes effective decisions based on thorough analysis and the needs of the organisation.
Focus on efficiency	Meets or exceeds the Council's standards by monitoring the quality of own work, team or service delivery. Continually looks for areas of improvement to ensure efficiency, effectiveness, and value for money.
Performance and learning	Demonstrates personal commitment to meet agreed performance standards and objectives. Learns from experience and takes responsibility for identifying and addressing personal development needs.
Team working	Proactively cooperates and interacts with colleagues, internal and external partners across the Council. Encourages others to develop a collaborative approach to share information, knowledge, and ideas.
Builds relationships	Presents a professional image; uses interpersonal skills to form positive and productive working relationships within and beyond the organisation.
Commitment to the organisation	Consistently supports and demonstrates an understanding of and commitment to the Council's vision and values. Acts with integrity and accountability.

All employees are expected to be flexible in undertaking the duties and responsibilities attached to their role and may be asked to perform other duties, which reasonably correspond to the general character of their role and their level of responsibility. All employees are required to be flexible to undertake out of hours work as required, meetings outside office hours will be routine and officers will be expected to attend. This job description will be supplemented and further defined by annual objectives which will be developed in conjunction with the postholder.

This job description will be subject to regular review and the council reserves the right to amend or add to the details.

Key Policies

We are an equal opportunities employer and therefore all staff are expected to comply with our equality policies and help create a work environment in which everyone is treated with dignity, respect, courtesy and fairness. You are also expected to fully comply with health and safety policies and procedures in force to help maintain and develop a safe working environment. In pursuing a practice of continuous improvement and seeking to obtain best value in all aspects of the service, staff will be expected to assist in other such duties as may be allocated for the benefit



of the organisation and their own personal development. Staff will be expected to assist if the council has to deal with the results of a civil emergency.

Signed (Job Holder):		Date:
Signed (Service Lead):		Date: