



Job Description

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| Role: | Beneficiary Caseworker |
| Reporting to: | CEO |
| Location: | 1st floor, 1 Jaggard Way, SW12 8SG |
| Hours of Work: | 35 hours per week (9am - 5pm, with some flexibility on start/finish times) |
| Job Purpose: | To assist applicants and eligible beneficiaries |

Duties and Responsibilities

1. To provide an efficient casework service for all applicants requesting help, supporting individuals through each stage of the process.
2. To liaise with Area Representatives to co-ordinate visits, ensuring that all necessary information has been gathered to enable the Beneficiary Assistance Committee to make informed decisions.
3. To co-service the Beneficiary Assistance Committee, writing clear, concise reports and preparing recommendations within agreed parameters
4. To execute post-committee decisions, including correspondence with beneficiaries and accurate, timely processing of payments, liaising with the Accountant on new, ongoing and exceptional awards.
5. To liaise with SBA's nominated conveyancing adviser on documentation for secured loans, updating loan files and records in conjunction with the Accountant
6. To report and record as required on database and manual systems, developing and maintaining filing systems as required.
7. To liaise with other service providers (Renovo, Manchester Citizens Advice) and charities, referring and signposting beneficiaries as appropriate.
8. To ensure that all applicants are dealt with equally and in accordance with SBA's policies and procedures, including data protection, equality and diversity.
9. To maintain client confidentiality throughout.
10. To contribute at trustee awaydays and attend relevant training opportunities

General accountabilities

11. To keep abreast of relevant legislation affecting current and future beneficiaries
12. In conjunction with all other SBA colleagues, to share in the execution of general office duties.
13. To carry out any other reasonable duties as specified by the CEO from time to time.

Measures for the role

- Beneficiary feedback
- Accuracy of records and reports
- Judicious and expeditious handling of casework

Person Specification



| | <i>Essential</i> | <i>Desirable</i> |
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| Professional Knowledge and Experience | <p>Previous success in providing a high level of responsiveness and care to service users in a social welfare or case management setting</p> <p>Emotional resilience</p> <p>Advanced organisational and problem-solving skills</p> | <p>Conversancy with the state benefits system and social welfare provision (eg mental health and housing services)</p> <p>Some experience at having worked in the law</p> |
| Interpersonal Skills | <p>Empathy for beneficiaries, the work of SBA and its values</p> <p>Strong team player able to work effectively with diverse individuals and groups</p> <p>Positivity, patience, tact</p> | |
| Communication Skills | <p>Confidence and clarity in analysis and expression</p> <p>Strong computer literacy (including use of Outlook, Word, Excel and databases)</p> | |
| Work Ethic | <p>Commitment to accuracy and timeliness</p> <p>Personal drive to improve processes and adapt to new ideas</p> | |