

SBA The Solicitors' Charity Job Description



Role: Beneficiary Caseworker
Reporting to: Head of Service Delivery
Budgetary Accountability: None
Location: London

Job Purpose:

Responsible for all aspects of the application process from initial enquiry to the execution of the monthly Awards Committee decisions.

Job Accountabilities:

To deal with all enquiries and to process new applications in a timely way ensuring that the client is supported throughout.

To maintain volunteer Area Representatives records, instructing Area Representatives and support the recruitment for Area Representatives to assist with the core work of the SBA.

To lead in the beneficiary casework presentation at the monthly Awards Committee meetings. This involves preparation and delivery of the presentation.

To undertake the post-meeting administration of the awards, scheduling payments and liaising with accountant to ensure these are made in a timely manner.

To manage the day to day relationship with partner providers such as Lawcare and Renovo to ensure that support is provide in a timely way.

To compile engagement reports on partner providers in a timely way.

To manage the secured loan service & liaising with SBA's lawyers regarding loans.

To liaise with colleagues to ensure open and transparent working practices.

To support in the training and induction of new staff.

Maintain paper and electronic files and with regard to obligations under GDPR regulations.

To undertake any regular training to update knowledge of matters that impact on the beneficiary service.

Any other duties that reasonably fall within the remit of the role.

Measures for the role:

1. Reports and presentations are prepared accurately and timely.
2. All deadlines met (within your control) e.g. casework.
3. You are recognised as being competent and highly regarded by Beneficiaries and staff and feedback given confirms this.
4. Communication is always professional, efficient, accurate, respectful and timely.
5. All records are well maintained, and reliable sources of information are updated at all times.
6. Complete confidentiality and discretion is maintained.

SBA The Solicitors' Charity Person Specification

	Essential	Desirable
Qualifications (academic, technical and professional)	Educated to GCSE grade level 5/6 in Maths and English	
Professional knowledge and Experience	<p>Direct experience in a client facing role dealing with people who are experiencing anxiety, mental & physical health problems.</p> <p>Working knowledge of the benefit system & debt management.</p>	<p>Experience of working in the mental health sector e.g. for a Charity, NHS</p> <p>Some experience of the legal profession</p>
Skills	<p>PC literate proficient in Word Experience in the use of CRMs.</p> <p>Ability to analyse issues summarise information and draft case notes.</p> <p>Planning and organising skills Ability to work on own initiate to tight deadlines.</p>	<p>Competence in Excel and Adobe</p> <p>Competence in encrypting, editing and redacting Word and PDF files</p>
Other	<p>Empathy for the work and vision of the SBA</p> <p>Complete confidentiality and discretion.</p> <p>Ability to work autonomously & as part of a team.</p> <p>Ability to engage with applicants in a non-judgmental way.</p> <p>Ability to analyse information and support applicants who present with complex situations and needs.</p>	<p>An understanding of the legal obligations under GDPR regulations</p>

Daily/Weekly tasks

Accountability	Tasks	Frequency
Monthly Awards Committee meeting	Processing AR reports and drafting case notes to Committee members. Accompanying AR on visits where necessary.	Daily Variable
Processing of applications	Updating paper and electronic records	Daily
Execution of Awards Committee decisions	Preparation of award grid, entering new data and scheduling of awards Scheduling of third party payments for accounts	Monthly Variable/Weekly
Managing partner provider relationships	Completing referral forms with relevant information on each beneficiary. Updating spread sheet	Weekly
Managing Secured Loans	Dealing with correspondence from Solicitors relating to loan repayments, remortgages and transfers of secured loans Dealing with documentation and instructing Russell-Cooke in relation to HMLR	Variable