



GUILDFORD  
B O R O U G H

**Caseworker  
&  
Case Services Team Leader  
(FG20 SD05)**



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| <b>Job Title</b>     | <b>Caseworker &amp; Case Services Team Leader</b>   |
| <b>Service Area</b>  | <b>Case Services</b>  |
| <b>Grade</b>         | <b>Caseworker L1 – Grade 2</b><br><b>Caseworker L2 – Grade 3</b><br><b>Caseworker L3 – Grade 4</b><br><b>Caseworker L4 – Grade 5</b><br><b>Casework Team Leader – Grade 6</b> |
| <b>Job Reference</b> | <b>FG20 SD05</b>  |

| <b>Reporting to</b>  | <b>Responsible for</b> |
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| Case Services Team Leader reports to Head of Customer, Case & Parking Services | Caseworkers            |
| Caseworker reports to Case Services Team Leader                                | Not applicable         |

| <b>Team Purpose</b>  |
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| We give thousands of internal and external customers a great customer experience, adding value by delivering the right outcomes. |

| <b>Role Purpose</b>   |
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| <p><b>Caseworker:</b><br/>                     Working on a professional and integrated case management basis, the postholder will respond to and seek to resolve service requests from external customers using technical knowledge, business rules, statutory guidance, systems and processes and following workflows in place. Caseworkers must ensure attention to detail, accuracy and excellent customer focus to deliver high standards of service and seek to resolve cases as quickly and efficiently as possible. The postholder will promote self-service where appropriate and ensure detailed and accurate records are kept using the appropriate corporate technology systems. Cases will cover a wide range of council services across different disciplines. Caseworkers will develop the range of skills, knowledge and in some instances, qualifications, required to undertake the role. The teams at all times will ensure a professional, inclusive and helpful approach to customers.</p> <p><b>Team Leader (in addition to the above):</b></p> |



The postholder will support the Head of Customer, Case & Parking Services 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. Undertake quality checking of work, providing training and support as required. Work with Customer Services and Specialist Services to ensure there is a clear understanding of the handoff points between each area. Maintain performance standards as agreed in conjunction with the Head of Customer, Case & Parking Services and address any performance issues as they arise quickly and in accordance with policies.

## Key Accountabilities

### Level 1:

- Assist the efficient, effective and consistent processing and resolution of customer casework, identifying and meeting customer needs and ensuring the sharing and dissemination of best practice
- Assist with the understanding of customer need and enabling a speedier, simpler, more responsive customer journey contributing to the continuous improvement in the delivery of the Council's outcomes and ensuring high levels of internal customer satisfaction
- Access and accurately update all relevant information systems, both customer and back office ensuring that the master customer record is updated and maintained through verification and validation, and in accordance with Data Protection principles
- Supporting customer self-serve and spotting opportunities for the Council to initiate further enabling and self-serve
- Manage non-complex customer issues effectively and understand when to consult with others, including Specialists
- Maintain confidentiality in line with agreed policy and relevant data protection legislation
- To support the continuous improvement of processes and procedures within the service using best practice from others where appropriate
- To provide support for the escalation of service issues
- To display the following levels of competency:
  - Be able to complete less straightforward rules-based tasks for one service
  - Be able to complete straightforward rules-based tasks for at least one other service area

### Level 2 (in addition to the above):

- Supporting customer self-serve and spotting opportunities for the Council to initiate further enabling and self-serve
- To display the following levels of competency:
  - Be able to complete less straightforward rules-based tasks and cases for at least two servicesOr
  - Be able to complete moderately complex cases and tasks for one service area where significant functional knowledge and skills are required

### Level 3 (in addition to the above):

- Assist with knowledge sharing across the casework team
- To display the following levels of competency:



- Be able to complete moderately complex cases and tasks for one service area
- Be able to complete less straightforward rules-based tasks and cases for at least two services

Or

- Be able to complete moderately complex cases and tasks for one service area where significant functional knowledge and skills are required
- Approved to train other caseworkers to complete moderately complex cases and tasks for a service area where significant functional knowledge and skills are required

**Level 4 (in addition to the above):**

- Promoting new ways of working, responsible for multi-skilling people within teams and encouraging knowledge sharing across casework teams
- Assisting with the design and development of tools and guidance notes which enable the team to self-serve and widen their knowledge
- To display the following levels of competency:
  - Owning the resolution of complex cases and tasks for one service area where significant functional knowledge and skills are required
  - Approved to train other caseworkers to complete complex cases and tasks for a service area where significant functional knowledge and skills are required

Or

- Be able to complete less straightforward rules-based tasks and cases for at least three services
- Be able to complete moderately complex cases and tasks for one service area where significant functional knowledge and skills are required

**Team Leader (in addition to the above):**

- To act as lead Caseworker in one or more areas of specialism, personally owning the resolution of more complex cases
- To support and develop others within the team in the areas of specialism as well as personally owning more complex cases
- Proactively design and develop tools and guidance notes for the areas of specialism to enable the team to self-serve and widen their knowledge
- Support operational management of the service, including overseeing people and responding to performance information
- To provide support for the escalation of service issues including more complex customer care issues

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



| Key Objectives                            |   |
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| <b>Working with customers</b>             | Resolve customer requests professionally, effectively and efficiently. Provide sound guidance and advice and ensure adherence to legislation and regulation. Develop and maintain good working 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. |
| <b>Working towards the Corporate Plan</b> | Contribute to Corporate Plan development and the development of associated plans and policies. Deliver agreed objectives and services associated with the Corporate Plan.   |
| <b>Knowledge of services</b>              | In-depth understanding of specialist area, being professionally qualified in one and good understanding of the operation of another.  |
| <b>Using systems effectively</b>          | Good IT skills and ability to learn new systems quickly.  |

| Specific Tasks                                 |   |
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| <b>Case Management skills</b>                  | 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 Specialists (progression & higher level). Ensure outcomes meet legislative and professional standards.   |
| <b>Team work and working with others</b>       | Support, inform and guide new customers 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.   |
| <b>Enquiries, reports and service requests</b> | 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 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, |



| Specific Tasks                       |   |
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|                                      | responding to information requests, having a deep knowledge of the data required.   |
| <b>Processing and administration</b> | 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. |
| <b>Strategy and policy</b>           | Provide input into corporate strategy, policy and programmes as required (progression & higher level)   |
| <b>Performance</b>                   | Working towards achieving the KPIs set by the Head of Customer, Case & Parking Services.  |

| Qualifications   |
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| <p><b>Level 1-2:</b><br/>                     Good standard of education with a minimum of 5 GCSEs or equivalent experience.</p> <p><b>Level 3-4:</b><br/>                     Educated to NVQ level 3 / A Level standard or equivalent experience.</p> <p><b>Team Leader:</b><br/>                     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).</p> |

| Knowledge, Skills and Experience   |
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| <p><b>Level 1-2:</b></p> <ul style="list-style-type: none"> <li>• Some experience of working in a customer focused, service delivery role and good admin skills</li> <li>• An understanding of the relevant legislation and regulations applied to area of service delivery</li> <li>• Proven ability to analyse and respond to requests and understanding when to escalate a case</li> <li>• Proven ability to be accurate, detailed and professional in approach to work</li> <li>• Proven ability to deliver high standards and good customer service</li> <li>• Strong ICT skills and proven ability to learn new systems quickly</li> </ul> <p><b>Level 3-4:</b></p> <ul style="list-style-type: none"> <li>• Extensive experience (minimum 2 years) in working in a customer focused, service delivery role</li> </ul> |



### Knowledge, Skills and Experience

- 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
- Proven ability to analyse, problem-solve 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

#### 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 specific qualifications.

### Special Requirements

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| <b>Emergency Planning</b> | 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.   |
| <b>Election Duties</b>    | <p>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.</p> <p>A separate payment for election duties will be made as determined by the regional Elections Committee.</p> |



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| <b>Standard Terms</b> | <ol style="list-style-type: none"> <li>1. To comply with appropriate legislation, service and council policies.</li> <li>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.</li> <li>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.</li> <li>4. To support the Council's equalities and diversity policies.</li> <li>5. To operate within the Council's IT policies and data protection rules and regulations.</li> <li>6. To operate within the Council's financial regulations.</li> <li>7. Manage budgets and resources ensuring that they are deployed effectively with robust internal controls and compliance with relevant regulations, policies and guidelines.</li> <li>8. To participate in internal committees and departmental working parties to ensure continuous improvement as required.</li> <li>9. Any other reasonable duties as may be required from time to time</li> </ol> |
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## 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:

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| <b>Guildford behaviours [competencies]:</b> see the framework in the Performance Review Toolkit for a full list behavioural indicators |  |
| <b>Core Competencies - All Workforce</b>   |  |
| <b>Embraces Change</b>   | Has a positive attitude to change, adapts to meet new challenges and introduces changes to improve organisational performance.   |
| <b>Innovation and creative thinking</b>  | Proactively generates and develops innovative ideas, opportunities or improvements in order to meet organisational objectives more efficiently and effectively   |
| <b>Effective communication</b>   | Communicates effectively. Uses communication methods and standards, together with well-reasoned arguments to convince and persuade where necessary.  |
| <b>Customer focus</b>  | Puts the customer first, builds effective relationships and seeks feedback to address their needs.   |
| <b>Problem solving &amp; decision making</b>   | 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.                                   |
| <b>Focus on efficiency</b>   | 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. |
| <b>Performance and learning</b>  | Demonstrates personal commitment to meet agreed performance standards and objectives. Learns from experience and takes responsibility for identifying and addressing personal development needs.               |
| <b>Team working</b>  | 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.     |





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| <b>Builds relationships</b>           | Presents a professional image; uses interpersonal skills to form positive and productive working relationships within and beyond the organisation.    |
| <b>Commitment to the organisation</b> | 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.

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| <b>Signed (Job Holder):</b>   |  | <b>Date:</b> |
| <b>Signed (Service Lead):</b> |  | <b>Date:</b> |