

Job title: Case Manager	
Reports to: Support Service Supervisor	Reporting to job holder:
Overall purpose: To provide support to individuals who work or have worked in the automotive industry and allied trades (and their dependants) by completing holistic assessment's and providing appropriate information, advice and guidance. To hold and manage allocated cases, agreeing action plans with individuals, and to assist them to access internal/external services through a referral process, if required. To work as part of a team with Health & Wellbeing colleagues identifying trends around need and to respond with targeted preventative intervention. To work towards quality assurance by engaging supported individuals to provide personal stories, case studies and offer their feedback on services. To measure the impact of the individuals' journey with Ben by recording distance travelled markers.	
Principle accountabilities: <u>Planning and organising</u> <ul style="list-style-type: none">• To promote a holistic culture and approach within an advisory team which supports the provision of high quality, focused and person-centred support to help individuals take control of their situation and move forward• To maintain up to date and accurate records for all individuals on our CRM and Wellbeing Star system• To deliver all appropriate aspects of Information, advice and guidance required to meet individuals identified needs ensuring they feel well informed and encouraged to access all appropriate support• At all times to effectively implement Ben's policies and procedures.• To manage a caseload and provide support to individuals, and identify when urgent/critical intervention is required• To manage the case where individuals are accessing alternative Ben services such as the Mental Health Pathway.• Remain objective and professional when assessing and supporting individuals, supporting them to access support from other organisation, charities or trusts <u>Business focus</u> <ul style="list-style-type: none">• To work within agreed criteria, policies and practices when supporting individuals and agreeing the assistance we can provide and intervention methods to implement• To be aware of the roles limitations and boundaries and make appropriate referrals internally or externally• To keep abreast of changes in legislation of Welfare Benefits and Statutory Provisions• To promote and maintain a safeguarding culture with colleagues ensuring that Ben's safeguarding procedures and protocols are effectively implemented to maintain a safe and secure environment for individuals• To comply with Ben's protocols and requirements on maintaining confidentiality <u>Communication</u> <ul style="list-style-type: none">• To ensure all communications and interactions with individuals and other stakeholders is effective, sensitive and professional• To provide effective handovers of referrals, sharing information with appropriate members of the team and in line with Policies and Procedures.• To communicate and engage with colleagues to ensure they are fully informed about matters which affect their day to day tasks• To liaise with Support Services colleagues to develop a team mentality and working practices <u>Budgetary control</u>	

- To comply with grant giving procedures regarding awarding funded support and the purchasing of services or goods.
- To support individuals to apply for financial support from other organisations, charities or trusts

Managing performance

- To contribute to the delivery of a culture of performance and service excellence within Support Services and Health and Wellbeing team
- To work and achieve agreed targets and customer service standards, providing positive outcomes and impactful results
- Provide information and reports relating to your work, to supervisors, managers, Head of Support, Senior Exec Team
- To be responsible and accountable for your decisions and actions, positively engaging in regular supervision, observations, appraisals and caseload reviews

Stakeholder relationships

- To build strong relationships with external referral partners, enabling smooth transition of support for individuals
- To build strong relationships with other funding trust, organisations to aid the ability to access further funding for individuals
- Represent Ben in a positive manner, and where appropriate liaise with the local authority and community groups to support the needs of individuals

Achieving customer service excellence

- To support the delivery of a consistent level of customer service to all individuals, family members, referral partners and industry partners, ensuring an experience which often exceeds expectations and that the service is viewed in a positive way
- Share best practice, new ideas and suggestions for service developments and improvements

Additional duties

- To attend regular team training, team meetings and development sessions, these will be held in various locations around the UK, mainly the Midlands and South East of England
- Occasional travel to meet individuals, colleagues, volunteer supporters and other organisations, this may involve overnight stays
- To undertake any other duties specified from time to time by your line manager or Head of Support Services

Deliverables – Key measures:

Planning and organising

- Information, advice and guidance will be delivered to individuals following principles and practices that ensure that the individuals physical, social and emotional needs are considered, and the appropriate support is provided
- Comprehensive, holistic needs assessments will be completed demonstrating individuals are listened to and heard and are enabled to take a personal responsibility for their support plans and progress
- Cases that are managed referrals for further investigation, or longer-term intervention internally or externally, will be supported in a person centred and holistic manner
- The individuals' dependency on Ben, will be minimised by ensuring they have access to impactful interventions, which result in long-term positive benefits for the individual (and their family)

- All support and assessment of individuals will be objective and professional
- Through consistent and proactive planning and time management all cases supported in line with SLA's

Business focus

- Reporting and recording systems will be accurately maintained to support a healthy, safe and secure environment for individuals, colleagues, wider team and organisation
- All aspects of the regulatory and organisational policy/procedure frameworks will be met to support decisions made and that they are of least risk
- Safeguarding issues will be identified and reported in a timely manner and in line with legislative and organisational requirements
- Diversity and equality of opportunity in the workplace will be demonstrated

Communication

- Effective working relationships will be maintained with other professionals and agencies who provide appropriate support for our individuals, their families and employers
- Individuals, Referral Partners, Industry partners and other stakeholders are informed about the services provided by Support Services
- Ben information is communicated accurately and on time so that colleagues are knowledgeable about matters that affect their day to day working lives and about the wider organisation

Budgetary control

- Procedures and process will be met when awarding funded support in line with for authorisation limits.
- All evidence will be available and documented in line with guides and policies.

Managing performance

- Case reviews will demonstrate quality assurance and enable evaluation of standard of support to individuals, families, referral and industry partners
- Targets, objectives and customer service standards will be met in line with your role and monitored against progress throughout
- Reports regarding your caseload or current work will be accurate and available as and when required
- Case Managers will be accountable for all actions, time management, and workload make supervisors aware when if any issues are encountered

Achieving customer service excellence

- Excellent customer service and practices will always be demonstrated and maintained
- Positive feedback about the quality of support provided to individuals, their family, and from referral and industry partners will demonstrate expectations are met or exceeded
- Good quality case studies will be completed supporting our work

Additional duties

- To undertake any ad-hoc project as required
- To strive to have a proactive attitude by helping others who may need assistance
- To offer suggestions as to how best to improve our service and delivery

PRIDE values

To embody and deliver in line with our values: -

Passionate
Respectful
Inclusive
Driven
Empowered

Experience required:

- Experience of community support, social care, and/or information, advice and guidance roles
- Welfare System/benefit knowledge
- Good knowledge of MS Office applications
- Working knowledge of some CRM and data analytics
- Knowledge and experience of Safeguarding Legislation (Vulnerable Adult and Child Protection best-practice)
- Experience of developing and maintaining partner relationships
- Effective communicator, verbally and in writing
- Positive, dynamic and solution-focussed
- Able to work within tight timescales
- Able to work remotely and on own initiative
- Able to see a task through to completion

Technical Knowledge:

- Level 4 in Advice and Information or willingness to work towards
- 2 years' experience working in an advisory capacity or similar role, managing your own caseload in a holistic manner
- Experience of working within regulated activity environments
- A specialist subject knowledge area is desirable, supported by training and/professional qualifications

Other significant role requirements:

- Excellent IAG practice and skills.
- Effective written communication skills to prepare documents, reports, procedures about the support for whom the post holder has accountability, its customers, and colleagues as required.
- Able to use initiative.
- Ability to work autonomously, prioritising simple and complex tasks.
- Ability to engage effectively with individuals, relatives and other stakeholders to promote and raise awareness of Ben and its services.
- Ability to maintain all aspects of confidentiality and to comply with all legislative requirements in relation to customers and colleagues.

Date updated: