

## Job Description

<b>Job Title:</b>	<b>Edinburgh Trust Caseworker</b>
<b>Department:</b>	Grants
<b>Reports to:</b>	Edinburgh Trust Manager
<b>Location:</b>	Thorn House, Edinburgh
<b>Purpose of the Role:</b>	To manage the distribution of grants from the Edinburgh Trust Fund and provide support to individuals in financial hardship.

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### Key Responsibilities and Accountabilities:

- 1. Assess new applications to provide direct grants and support to individuals in financial hardship**
- 2. Manage a caseload and review existing cases, ensuring individuals are supported appropriately**
- 3. Manage a personal work programme**

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### Duties:

- 1. Assess new applications to provide direct grants and support to individuals in financial hardship**
  - Review and rigorously assess grant applications against the eligibility criteria of the Edinburgh Trust, in accordance with the Grants Policy; and establishing the case for demonstrable need
  - Complete a welfare benefits check to ensure individuals are receiving their full entitlement to statutory support and provide information to assist with benefit claims
  - Complete CRM case records, ensuring that all data is accurate and up to date, all supporting documentation is attached and produce a case paper for review by the Edinburgh Trust Manager
  - Provide information and assistance to those who are ineligible for support from the grant funds managed directly by the charity. This may include directing to another charity, or other support services, listed on the Turn2us signposting database, or directing to other sources of support provided by the charity.
- 2. Manage a caseload and review existing cases, ensuring individuals are supported appropriately**
  - Manage approved cases, arranging and reviewing payments
  - Provide appropriate support to individuals, as required, including signposting to financial and other support from charities and organisations

- Review existing cases, in accordance with the Grants Policy and make recommendations to withdraw/update grant support, where required

### **3. Manage a personal work programme**

- Plan and manage a work programme, ensuring that cases are processed in a timely fashion, are robustly assessed and appropriately managed in a caring and compassionate way, to help individuals in financial hardship
- Meet with the Edinburgh Trust Manager to support coaching and development and to review progress and challenges
- Participate in team meetings and contribute to the recording and reporting on management information and the impact of the service.

These are the normal duties, which the charity requires from the position. However, it is necessary for all staff to be flexible and all employees will be required from time to time to perform other duties as may be required by the charity for the efficient running of the charity. This Job Description is non-contractual. It will be reviewed from time to time and may be subject to change.

The postholder will take responsibility to integrate safeguarding into all aspects of their work, complying with organisational policies and frameworks.

The post holder will be expected to ensure that their work complies with contractual terms and conditions, the Charity's policies and procedures and key legislation, including the General Data Protection Regulation (GDPR) and charity law.

## Person Specification

### Skills:

#### Essential:

- Interpersonal skills and the ability to communicate in a warm, empathic, courteous and professional manner
- Ability to plan and prioritise work
- Ability to work to agreed deadlines
- Ability to competently use MS Office suite to deliver work
- Excellent written and verbal communication skills, with an ability to communicate with confidence
- Numeracy skills
- Ability to use a CRM system

### Knowledge:

#### Essential:

- Broad knowledge of the scope of the Third Sector and statutory welfare provision in the UK
- Understanding of the welfare benefits system in Scotland
- An understanding of data protection
- An understanding and commitment to promote equal opportunities and diversity
- An understanding of safeguarding

### Experience:

#### Essential:

- Experience of working in a grant-giving, information or advice role
- Ability to work as part of a team and to be a supportive colleague

### Personal Attributes:

- A positive and energetic approach to helping to make a difference for people in financial hardship
- A commitment to very high standards of work and customer care
- Highly motivated with an ability to work on own initiative and work proactively in key areas of responsibility.