Part 1: Summary job details

Job title: **Visiting Caseworker (regionally based, with other travel across the UK on occasion)**

**1 x South West England & South Wales**

**1 x North West England & North Wales**

# Contract basis: Full-time, permanent (35 hours a week), subject to satisfactory completion of six-month probation period

# Reporting to: Visiting Caseworker Manager

# Direct reports: None

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# Based: For this role, the post holder will be home-based, visiting households within a dedicated region, and on occasion, across the UK (travel expenses covered). Applicants should be car owners (with business use insurance cover, with a full, clean driving licence) and/or located within easy reach of a main line railway station. Use of a dedicated home office will also be required.

# Some travel to our London office will be required, in line with business need; this is likely to involve up to 20 office visits per annum (reasonable expenses covered), details of which will be discussed with candidates at interview.

**For all other staff members in the charity (a total team of 24), we operate a ‘mixed-mode’ working model, where staff work both from home and from our offices in central London.**

# Annual salary: CST Band E: £37,500 - £40,000 depending on experience. Staff also receive an annual cost-of-living-related salary uplift.

Part 2: About the Trust

Clergy Support Trust is the largest and oldest charity supporting Anglican ministers and their families. Put simply, it exists to serve those people who, through their ministry, spend their lives serving others. Founded in 1655, the Trust has grown significantly in recent years and, in 2023, supported 2,700 households across the UK and Ireland, through a wide-ranging programme of grants and support services. This vital work is driven by a dedicated and friendly team of just over 20 colleagues from a variety of backgrounds, overseen by a committed Board of Trustees.

This is a hugely exciting time to join the Trust. We are working hard to deliver our 2022-25 Strategy, a period of significant growth, while looking ahead to a dynamic future where we will support clergy households in new and exciting ways. Recent developments have included the establishment of new training, online and research initiatives, as well as increasing our core grant-giving activity. In recognition of this, we were pleased to be shortlisted for ‘2023 Charity of the Year’ by the Association of Charitable Organisations. We work closely with the Church and other partners to improve the financial, health and overall wellbeing of clergy and their families, and have a growing programme of external engagement, including our flagship annual Festival Service –at St Paul’s Cathedral every spring.

As part of our ambitious plans, we seek two new colleagues, who will join our current team of two caseworkers covering the UK and Ireland. Our two new colleagues will be regionally based, one covering South West England & South Wales, and the other North West England & North Wales (with other travel across the UK on occasion).

Clergy Support Trust is an inclusive and supportive organisation. We warmly welcome applications from candidates of all backgrounds, and believe a diverse workforce leads to fresh ideas and creative thinking, as well as better reflecting our beneficiary base across the UK and Europe.  If you are keen to join to a small, passionate team where your skills and expertise will positively impact clergy families, and where you will be nurtured through our strong commitment to staff development (alongside an excellent package of benefits), then we’d love to hear from you.

Part 3: Job description

Team members will each deal with an approximate caseload of 70-100 cases / visits per year. Central to the role will be supporting and advocating on behalf of vulnerable applicants, or those who are living in particularly complex or challenging situations. The job will be wide-ranging, and include elements of advocacy, support, income maximisation, mediation, partnership working and processing our own grants where appropriate, with the overall aim to reach long-term sustainable solutions for Anglican clergy households.

The roles will join the Charitable Services team (soon to be 16 FTE) and the charity as a whole (24 FTE). In particularly busy times, these roles will act as an overflow for grant applications, to support colleagues in the Charitable Services Team.

These additional roles offer a unique opportunity for dynamic, solution-focused, empathetic, casework professionals, in a small, dynamic-charity, ready to embark on its next three-year strategy (2025-28).

Key responsibilities

Key responsibilities, working closely with the Visiting Caseworker Manager, Director of Charitable Services, Head of Grants & Services, Senior Grants & Services Officers and the Charitable Services team, will include:

1. **Receive referrals from new and existing applicants via the Grants & Services team, for potential casework and home visits**

* Assess and prioritise urgent cases on a weekly basis.
* Prepare and familiarise applicant background from internal CRM system and previous support provided.
* Understand reason/s for referral and make initial contact with applicant, including initial telephone assessment if appropriate (ideally within two working days).
* Confirm new referral eligibility (savings, property and proof of ministry) in exceptional cases.
* Consider the urgency and any associated risks in relation to a potential home visit.
* Arrange potential home visit, or online meeting after initial contact (or combination of both).
* Liaise with applicant to confirm date and time of home visit or meeting.
* Arrange and book own travel arrangements.
* Log confirmed visits on CRM system and shared calendar and ‘check in’ with line manager when starting and completing a home visit.

1. **Conduct home visit (or online meeting)**

* Provide thorough assessment of current situation, taking into consideration time available and wellbeing of the applicant.
* Conduct general income maximisation check (welfare benefits, grants check etc), where necessary.
* Ensure all state benefits are applied for, giving assistance where needed, including mandatory reconsiderations, appeals and complaints.
* Consider support for all members of the household.
* Identify, discuss and escalate (to Designated Safeguarding Officer) any safeguarding concerns within the household (for children and adults at risk) and any potential referrals required in order to provide extra support.
* Gather information in order to create individualised action plans with the primary contact and other household members.
* Assess and prioritise urgent actions during the meeting.

1. **Develop an action plan**

* Complete a brief written summary of the visit or meeting and draft an action plan for possible areas of help and support with allocated responsibilities and agreed timelines.
* Prioritise urgent actions and agree responsibility for each action with applicant, taking care and consideration not to overwhelm them.
* When required, gain written consent from applicant to help advocate with other external parties in relation to their situation (third party authorisation).
* Liaise with other agencies (eg, DWP, Social Services, NHS, other charities, voluntary organisations, occupational benevolent funds, Dioceses, CofE Pensions Board etc.) where necessary.
* Refer to our own partnership support services if appropriate (eg, CMCU, StepChange Debt Charity, Sleepstation, The OT Practice etc) for help and support.
* Research and identify any local support groups, organisations, charities that may help applicants engage with local community, for longer-term support.
* Consider and recommend most appropriate grant support through our own internal grants programme.
* Advocate on behalf of the applicant (eg, complete internal and external applications, liaise with other external agencies, members of the Church where necessary).
* Act as third party for complaints, mediation or appeal hearings with applicants, either in person, online, or helping prepare a written submission.
* Keep accurate and objective notes and communications within our CRM system, and ensure this is kept up to date on a daily basis.

1. **Follow-up**

* Manage and update action plans, while keeping in contact with beneficiary on a regular basis.
* Encourage and empower applicants to complete their actions and know when to step in, as and when necessary.
* Only in exceptional circumstances, consider a further home visit, if deemed appropriate.
* Manage expectations of household by closing action plans and to encourage future communications through the grants and services team.
* Keep a log of all annual income identified (successful benefits, appeals, external grants for impact measurement purposes) on CRM system.

1. **Other reasonable duties and projects commensurate with the post**

* Support and work closely with other VC colleagues sharing areas of expertise.
* Work collaboratively with other Charitable Services team members when providing support to households.
* Potential to contribute towards wider CST online support offer (eg, content, webinars, blogs etc).
* Attend team and staff meetings raising any potential issues relating to applicants.
* Adhere to the charity’s policies at all times.
* Support colleagues with national and local events such as the Charity’s Annual Festival and Annual Assembly.
* Reviewing and evaluating own performance and identifying and acting upon areas for improvement and development.
* Work flexibly to meet the changing demands of our beneficiaries and the charity.

Part 4: Person specification

| Attribute | Essential | Desirable |
| --- | --- | --- |
| **Experience, skills and abilities** | Significant experience of working within a charity / not-for-profit or grant making trust, supporting individuals and families with complex health and care needs, elderly, or vulnerable applicants, face-to-face, online and over the phone.  Significant knowledge and experience in at least two of the following areas:   * Welfare benefits and submitting appeals or complaints. * Mental health support * SEN education advice including SEN support, EHCPs and SENDIST tribunals. * Local authority and other statutory support such as Social Service Assessments and services, complaints, DFG entitlements. * NHS services, continuing health care either for children or adults.   Experience of working alongside and liaising with other external agencies, charities and organisations  Excellent problem solving and prioritisation skills and the ability to gently influence and persuade with a belief of empowering individuals  Experience and knowledge of safeguarding, with the aptitude of knowing when to escalate concerns.  Excellent communication skills (both written and verbal) and high levels of attention to detail  Ability to work in a methodical manner, prioritising and juggling numerous applicant needs.  Excellent inter-personal skills and demonstrable ability to work in a small team. | Experience of processing grants for individuals within a grant making trust.  Experience of applying for grants from other grant giving charities on behalf of individuals  Knowledge and understanding of the Church of England  Knowledge of CRM systems  Experience or knowledge of a particular specialist area relating to elderly, mental or physical wellbeing or income maximisation. |
| **Personal** | Good team player, self-aware and highly motivated, and with a ‘can do’ attitude, willing to contribute to the overall success of the charity.  Ability to work under pressure with resilience.  Happy to work alone, with the support of line manager, and colleagues in the Charitable Services team.  Demonstrable sympathy with the Christian ethos of the Trust. | A willingness to bring ideas and improvements to our ways of working, including our online offer. |
| **Education & training** | Recent and up to date welfare benefits training.  Recent training in safeguarding.  Willingness to undertake further training. |  |

Part 5: Further job particulars

Hours of work: 35 hours per week worked flexibly. The Trust’s ‘core hours’ are 0900 – 1630, Monday to Friday.

Expenses: Expenses will be covered for applicant home visits undertaken by the post holder.

Pension: The postholder will automatically be enrolled into the Trust's pension scheme, which attracts an employer contribution equivalent to 10% of basic gross salary.

Death in service: Life Assurance (Death in Service cover) of 4x salary will be provided for your spouse/dependants in the event of your death whilst you are an active employee of the Trust.

Holiday: The standard annual holiday entitlement in any holiday year is 25 days, exclusive of recognised public holidays. The Trust also closes between Christmas and New Year, additional to annual leave allowances, and colleagues have an extra day of leave for their birthday. We also offer study and volunteering leave.

Support: The trust offers front-line staff monthly supervision sessions with an external counsellor. Our Employee Assistance Programme is also available to support all staff members.

Checks: These roles will be subject to checks through the Disclosure & Barring Service upon offer of employment.

Part 6: How to apply

To apply, please address your application to Sarah Davies, Director of Charitable Services, on [vacancies@clergysupport.org.uk](mailto:vacancies@clergysupport.org.uk) and include:

* Confirmation of which region you applying for.
* Curriculum Vitae.
* Covering letter (no more than two sides of A4) explaining why you are interested in the role and how you meet the person specification (please provide specific examples in your supporting statement).
* Completed copy of the attached Criminal Record Declaration form.

**Closing date for receipt of applications: 12 noon, Monday 5th August 2024**

First interviews will be with Director of Charitable Services and one other team member. These will likely be held on 15th and 16th August online.

Successful candidates will then be asked to attend our Westminster office for interview and meet the team w/c 19th August.