



Case Manager



The role of a Case Manager is to act as a single point of contact throughout the customer journey.

You will manage and resolve the majority of cases, owning them through to completion. You will need a level of knowledge and expertise around a range of functions and activities, with the aim to develop knowledge across the organisation, building strong networks of internal and external contacts. Case work may be routine or proactive and, in order to resolve complex and contentious cases, you will refer to Specialists for specific advice and guidance.

Senior Case Managers will also co-ordinate activities, manage work flows and allocate resources. They will be responsible for training and mentoring colleagues, ensuring that knowledge is shared and embedded across the organisation.





Job Description & Person Specification

JOB TITLE:	Case Manager
REPORTING TO:	Appropriate Operational Manager, Specialist or Headship
LOCATION:	Flexible and Variable
GRADE:	F

Key tasks

- Efficient, effective and consistent processing
- Administration
- Understanding of customer need
- Supporting customer self-serve
- Spotting opportunities for further enabling and self-serve
- Continuous improvement of processes and procedures
- Understand when to consult with others, including specialists
- Understanding information
- Knowledge sharing
- Manage more complex cases and projects
- Develop tools, guidance notes and enable team to widen knowledge
- Wider knowledge of several areas of the business
- Building and presenting business intelligence
- Finding solutions and proposing options

Knowledge

Essential

- Competent in the use of Microsoft Office.
- Principles of good customer service
- Excellent knowledge of different services across the Councils
- Values and promotes equality and diversity
- Understands the principles of data protection

Desirable

- Experience of working with elected members or in a political environment.
- Knowledge and understanding of Health & Safety legislation and requirements

Skills & Abilities

Essential

- Commitment to providing excellent customer service
- Excellent communication skills both written and oral, with a good telephone manner
- Numerate
- Good interpersonal skills
- High level of accuracy and attention to detail
- Ability to work under pressure
- Team Player
- Persuasive and encouraging adopting a coaching style to enable customers

Desirable

- Problem solving and decision making

Qualifications

Essential

- Good general standard of education (minimum to GCSE standard or equivalent, including English and Mathematics)
- Evidence of continuing development of professional skills, e.g. through training, qualification and/or experience.

General Requirements

To undertake other duties as reasonably required

Actively demonstrate the behaviours as detailed in the Councils' Behaviour Framework

This job description sets out the duties of the post at the time it was drawn up. Such details may vary from time to time without changing the general character of the duties or the level of responsibility involved.

SIGNED:

DATE:

Case Management Team Customer

Purpose

The purpose of the Case Management Team is to provide a fully integrated customer service for more complex enquiries, projects and transactions focussed on our themes of People, Place and Priority. They will do this by acting as a single point of contact to both external customers and internal colleagues throughout the complete customer journey or project.

The Case Management function will progress activity that cannot be completed at the first point of customer contact, for both internal and external customers. Case Management roles provide a single point of customer contact for more complex cases that cannot be completed by Customer Services, and so will receive most transactional work from external customers via the Customer Services Team. Requests and case work may also be pro-active and routine. Projects will mostly be pro-active and with the intent of adding value to our priority themes of People, Place and Priority or to our organisational Vision.

Case Managers will undertake work on behalf of both internal and external customers; this work may also be both reactive and pro-active in nature. The work of a Case Manager may require the co-ordination of multiple resources and some data collection and validation activity. Case Managers in this team will also be deployed into our Localities Teams to deliver services closer to our communities and estates.

Case Managers will deliver the majority of more complex core processes, such as typical benefits cases, planning applications or finance enquiries for example. Case Managers will have a level of expertise in some activities and functions probably that has been obtained in a current role that allows them to conclude typical or standard cases to conclusion. In time we will expect Case Managers to grow the number of tasks they can perform for customers in particular within their theme, without the restriction of historic service boundaries. This will make for a more rewarding role with opportunities to develop.

Case Managers working within Customer will:-

- Deal with the more complex reactive service requests coming from colleagues and Members or self-generated activity required for planned work. Initial contact with the customer could come from the Customer Service team (they triage and hand over the more complex service requests to Case Managers), or from the internal customer directly.
- Deal with more complex external and internal projects.

- Undertake some of the work previously undertaken by professional officers in current services where the process or activity does not require Specialist input and/or is or can be highly systemised.
- Take responsibility for resolving cases to the satisfaction of the customer, pro-actively keeping them informed of progress every step of the way.
- When encountering a problem with a service request, or getting stuck or where needing help to resolve refer the matter to a Case Management Lead or Specialist team. Through these routes the Case Manager will then receive the information they need to complete the case, and they will then act as the single point of contact to keep the customer updated on progress.

Case Management Lead – (Grade H)

These roles will develop and oversee the day to day activities of the Case Management function and undertake all projects and tasks needed to ensure the smooth running of the team. These roles will also be the first point of contact for Case Managers when they need advice and support on a challenging or difficult case or project or just when they get stuck in delivering a core process or case that has been allocated to the team. If they cannot resolve the issue, they may need to seek advice from a Specialist.

Case Managers- (Grades H F and D)

Case Managers will perform the tasks as set out in the key activities section above.

Case Managers will be organised around our priority Themes and internal customer needs thereby aligning to the Case Management Lead roles above. Cases may overlap our Themes and therefore any theme boundaries that we create will be flexible as will resource allocation of Case Managers to Themes. An appetite for learning new skills, and processes will be key for Case Managers.

As we step up the Case Management function it is likely most people will be working on processes that they are broadly familiar with, although processes will improve in time in light of our process redesign work stream. In time, and with support and development, we will expect Case Managers to build on their core skills to broaden the nature and number of cases they can support and deliver.

Case Management Team Commercial, Investment and Change

Purpose

The purpose of this function will be to lead the delivery- directly or through facilitation and enabling- of major place schemes and programmes across the area, creating conditions for growth, prosperity and wellbeing.

Case Managers- Project Manager (Grade H)

This team will support and drive further business change activity during and after the implementation of our current transformation programme. This team will at times be enhanced with further resources (subject to relevant business cases) should major programmes emerge.

These roles will bring drive, rigor and discipline to the business change activity and will bring strong co-ordination and project management skills. Working closely with the Programme Manager they will support the delivery of priority change activity.

Case Managers- Business Analyst (Grade H)

Business Analysts will join the Case Management area of the team, assisting in particular with information and data requirements associated with Commercial, Investment and Change.

Case Managers- Project Delivery (Grade D,F)

This team will deliver support to the Programme Manager, and Project Managers, on a wide range of high profile and strategically important work activity including the delivery of project activity, the creation of key project documents and plans, the planning of project engagement and communication, the governance reporting on projects, as well as administrative support for the team.

Case Managers- PMO Support (Grade D,F)

We need a strong and proactive PMO team in place to ensure our two priority programmes (business change and delivery of growth) are supported appropriately and can be delivered successfully.