

Casework supervision: competences

Ensuring the quality of advice

Supervising individual case workers and the team

Managing the organisation of casework

Ensuring the quality of advice

1. Provide guidance to Case Workers	
To do this you need to be able to: <ol style="list-style-type: none">1. help Case Workers to find information in the Citizens Advice system, reference books etc2. explain and interpret complex information and case law3. offer advice on tactics4. identify ways of progressing research and campaigns issues	Before doing this you need to: <ol style="list-style-type: none">a) <i>have the competences for Specialist Adviser or Case Worker</i>b) <i>be aware of the range of support needs in the team</i>c) <i>understand the aims of ensuring the client receives the best possible service and that the Case Worker is developed and not undermined.</i>d) <i>be aware of limits of your own knowledge and sources of specialist guidance.</i>

8. Monitor the quality of case work in progress	
To do this you need to be able to: <ol style="list-style-type: none">1. decide on the appropriate level of monitoring for individual Case Workers2. ensure that<ul style="list-style-type: none">▪ advice is accurate and complete▪ conflict of interest is dealt	Before doing this you need to: <ol style="list-style-type: none">a) <i>have attention to detail</i>b) <i>be committed to quality of advice for all clients</i>c) <i>have a 'rights' approach to casework which interprets legislation and regulations in a way which will best promote</i>

<p>with any necessary paperwork is/has been completed</p> <ul style="list-style-type: none"> ▪ the client has been kept informed of progress 	<p><i>the client's interest</i></p>
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9. Monitor the quality of work from case records

<p>To do this you need to be able to:</p> <p>Ensure that:</p> <ol style="list-style-type: none"> 1. case records include full details 2. clients' problems and advice given are clearly stated 3. mistakes are identified and action is taken to correct mistakes 4. feedback is given to the caseworker and recorded 	<p>Before doing this you need to:</p> <ol style="list-style-type: none"> a) <i>be familiar with Citizens Advice and bureau standards for case records</i> b) <i>be familiar with and committed to Citizens Advice/bureau policies and procedures</i>
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10. Review and evaluate the casework service

<p>To do this you need to be able to:</p> <ol style="list-style-type: none"> 1. note and report problems/issues eg: trends in client queries 2. give feedback and suggestions to improve the running of case work and the whole bureau service 3. contribute to or lead the annual review of casework 	<p>Before doing this you need to:</p> <ol style="list-style-type: none"> a) <i>know what the review process is</i> b) <i>know own role in the review process</i>
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Supervising individual case workers and the team

11. Motivating individual Case Workers	
<p>To do this you need to be able to:</p> <ol style="list-style-type: none"> 1. keep Case Workers informed about the resources available 2. acknowledge Case Workers expertise and experience 3. ensure the fair allocation of work 4. be open and approachable 5. give feedback sensitively 	<p>Before doing this you need to :</p> <ol style="list-style-type: none"> a) <i>be able to show empathy with the Case Worker</i> b) <i>guide and advise without taking over</i> c) <i>give reassurance and promote confidence</i> d) <i>give clear and specific positive and negative feedback</i> e) <i>challenge appropriately</i> f) <i>be open and approachable</i> g) <i>be positive, helpful and fair</i>

6. Supporting individual Case Workers	
<p>To do this you need to be able to:</p> <ol style="list-style-type: none"> 1. recognise the different levels and types of support each Case Worker needs 2. give reassurance 3. be pro-active in noticing any difficulties, and offering help, especially when Case Workers seem to be getting 'out of their depth' 4. make sure appropriate breaks are taken 5. help new Case Workers with their learning activities, 	<p>Before doing this you need to:</p> <ol style="list-style-type: none"> a) <i>know about experience, competence and confidence of the Case Workers you are working with</i> b) <i>be assertive</i> c) <i>be open and approachable</i> d) <i>be positive, helpful and fair</i>

7. Developing individual Case Workers

To do this you need to be able to:

1. give clear and specific positive and negative feedback
2. challenge Case Workers sensitively on information/advice and on any expression of negative attitudes
3. offer the opportunity and support to take cases further
4. pass on specific positive and negative feedback on individual Case Workers performance to the manager
5. suggest possible development/training needs to the individual Case Worker and manager

Before doing this you need to:

- a) *be committed to the development of all Case Workers*
- b) *be comfortable with your own authority*
- c) *be able to show empathy with the Case Worker*
- d) *give reassurance and promote confidence*
- e) *give clear and specific, positive and negative feedback*
- f) *challenge appropriately*
- g) *identify training needs*
- h) *use some coaching skills*

8. Assessing Individuals

To do this you need to be able to:

1. assess Case Workers' strengths and weaknesses, based on independent file review and your observation and interaction with them
2. match your assessment to the Case Worker competences
3. complete the relevant sections of the record of learning/personal development journal clearly and accurately
4. Where a Case Worker's performance is consistently below standard, ensure that corrective action is taken

Before doing this you need to:

- a) *understand the principles of assessment*
- b) *understand your role in the assessment of Case Workers*
- c) *understand the Citizens Advice competence based assessment scheme*
- d) *understand the Case Worker competences*
- e) *understand how to complete the relevant sections of the record of learning/personal development journal*

9. Supervising the case work team

To do this you need to be able to:

1. assess the overall strengths and weaknesses of the team including working relationships, experience and skills
2. encourage teamwork by promoting joint learning and providing feedback to the team
3. run individual and/or team supervision sessions as appropriate
4. keep team up to date by providing written and/or team meetings
5. contribute positively to discussion of the whole teams training needs
6. note any tensions within the team
7. minimise conflict by taking appropriate action

Before doing this you need to:

- a) *be committed to the development of all Case Workers*
- b) *be comfortable with your own authority*
- c) *give reassurance and promote confidence*
- d) *give clear and specific, positive and negative feedback*
- e) *deal with conflicts sensitively and assertively*

Managing the organisation of casework

10. Managing the caseload

To do this you need to be able to:

1. plan the overall level of case load
2. ensure the appropriate allocation of cases to individuals
3. monitor the individual and the overall level of caseload

Before doing this you need to:

- a) *Know the agreed safe level of caseload*
- b) *know bureau policy on prioritising of services*
- c) *know the limits of your authority*

11. Overseeing the operation of the casework management system

To do this you need to be able to:

1. ensure effective practice for:
 - storing live cases
 - storing dormant cases
 - archiving of dead cases
 - using indexes and file tracking systems
 - tracking follow up work, ensuring that it is allocated and recorded appropriately eg diary for deadlines and time limits, bring forward files
 - recording post coming into and leaving the bureau.
 - recording internal or external referrals,

Before doing this you need to:

- a) *know the elements of the casework management system*
- b) *know the limits of your authority*
- c) *pay attention to detail*

12. Taking immediate or holding action on problems

To do this you need to be able to:

1. take action on:

- clients becoming aggressive or violent
- incorrect advice having been given
- incorrect, inaccurate or inappropriate letter sent
- missed deadline or time limit
- confidentiality query
- client complaint
- Case Worker non attendance at eg tribunal, client appointment,
- Pass on important/urgent information and issues which are outside your authority

Before doing this you need to:

- a) *know bureau policy on handling aggressive clients*
- b) *know bureau policy and practice on dealing with mistakes*
- c) *know bureau policy and practice on confidentiality and client complaints*
- d) *know bureau policy and practice on dealing with Case Worker absence*