



**Role:** Debt Caseworker  
**Location:** Hybrid  
**Reports to:** Debt Manager  
**Hours:** Full time (37.5 hours per week)  
**Contract:** Fixed term until 31st March 2025, with possibility of extension subject to funding  
**Salary:** £34,135.72



## The role

To provide over-indebted Londoners with free, face-to-face/telephone advice that is accurate, effective and tailored to individuals' circumstances. This includes:

- Provide case work covering the full range of debt - Interviewing those that access our service using sensitive listening and questioning skills in order to allow them to explain their problem(s) and empower them to set their own priorities.
- Researching and exploring options and implications so that those accessing our service can make informed decisions.
- Ensuring income maximisation through the appropriate take up of income, including those relating to water charges, benefits, tax and housing.
- Providing in-depth quality advice and on-going casework, including acting for the client where necessary using appropriate communication skills and channels.

- Maintaining detailed case records, ensuring that all work meets all auditing and quality standards and the requirements of the funder.

CAWF operate on a hybrid model with a combination of home-based and outreach sessions. The face to face requirement will be determined by the funders KPI and business needs. Therefore, the post holder must be flexible in the channels they deliver advice, for example via telephone, video-conference and email, as well as face to face.

## **Role profile**

### **Advice giving**

- Interview clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities.
- Use the Citizens Advice AdviserNet website to find, interpret and communicate the relevant information.
- To maintain detailed case records including ensuring that all work meets all auditing and quality standards and the requirements of the funder and that all case records are written up in a timely manner
- Research and explore options and implications so that clients can make informed decisions.
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
- Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
- Ensure that all work conforms to the organisation's agreed processes and the Advice Quality standard / other funding requirements, as appropriate.
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

### **Research and Campaigns**

- Assist with research and campaigns work by providing information as appropriate.
- Alert clients to research and campaign options.
- Professional Development.
- Keep up to date with legislation, policies and procedures and undertake appropriate training.

## **Administration**

- Attend relevant internal and external meetings as agreed with the line manager. Prepare for and attend supervisor sessions/team meetings/staff meetings as appropriate.
- Use IT for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production.
- Ensure all work conforms to the organisation's systems and procedures.

## **Other**

- Keep up to date with legislation, policies and procedures and undertake appropriate training. This includes ensuring you complete a minimum of 16 hours/equivalent of technical debt advice CPD accredited training or qualifying activity and maintaining an up-to-date record of all training sessions.
- Complete required training to comply with quality assurance processes.
- Carry out any task that may be within the scope of the post to ensure the effective delivery and development of the service.

# Person specification

## Essential Criteria

1. Demonstrable knowledge and experience of debt advice and casework.
2. Hold a valid Money Advice Service accredited qualification in debt advice to level three or higher via the Community Money Advice, a certificate in Money advice practice (Cert MAP) from the Institute of Money Advisers or Money Advice Service's Giving Good Debt Advice modules for advice work, specialist casework and court representation.
3. Understanding of the debt advice model with proven casework skills and experience of dealing with complex and challenging cases.
4. Ability to deliver high quality advice and casework and financial capability sessions to meet targets whilst ensuring collection of data to support funder's monitoring and reporting requirements.
5. Have essential IT and telephone skills and ability to use an online based Client Management System (CMS) to deliver advice across multiple channels and maintain case records.
6. A commitment to continuous professional development, including a willingness to develop knowledge and skills in advice topics.
7. Ability to work in outreach settings with an understanding of information assurance and safety in those settings.
8. Ability to commit to and work with the aims, principles and policies of Citizens Advice Waltham Forest.
9. A good up to date understanding of equality and diversity and its application to the provision of advice.
10. Ability to use sensitive listening and questioning skills to get to the root of the issues and empower clients, whilst maintaining structure and control of meetings

## Desirable criteria

11. Knowledge and experience of delivering welfare benefits advice.

**Candidates must meet all essential criteria on the specification in order to be shortlisted for interview.**

In accordance with Citizens Advice national policy we will require the successful candidate to be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.