



Citizens Advice Peterborough

JOB DESCRIPTION

JOB TITLE:	Debt Caseworker
RESPONSIBLE TO:	Operations Manager
PLACE OF WORK:	Peterborough
SALARY:	£28,438
HOURS OF WORK:	35 hours per week
TERM:	Fixed term contract to 31 st May 2026

Purpose of role:

To excel against agreed targets in the provision of an effective debt casework service, compliant against quality standards including the MaPS quality of advice framework. Ensuring that clients receive their full entitlement to all benefits, receive appropriate income maximisation and financial capability support, and experience a positive client experience from Citizens Advice Peterborough.

To be successful in this role, you will need to be confident, motivated and willing to try new things, have excellent communication skills with an ability to work under pressure to achieve targets and outcomes with minimum supervision.

To be appointed, you will need to have knowledge and experience of complex debt casework, covering priority and non-priority debt advice, options and insolvency solutions.

Debt Caseworker

Citizens Advice Peterborough

Main duties and responsibilities

Casework

- Provide casework covering the full range of debt advice.
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning creditors
- Negotiate with third parties as appropriate.
- Ensure income maximisation through the take up of appropriate benefits.
- Prepare and present cases to the appropriate statutory bodies and courts as appropriate.
- Assist clients with other related problems where they are an integral part of their case and refer to other advisers or specialist agencies as appropriate.
- Provide advice and assistance to other staff across a range of debt issues.
- Ensure that all casework conforms to the Financial Conduct Authority and Debt Advice Quality Framework in relation to own casework.
- Deliver consistent performance against funder or service targets/outcomes.
- Maintain accurate case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Ensure that all work conforms to the CAP systems and procedures.
- To actively empower and support clients where appropriate so that they are able to deal with their problem in the future.
- To collect and record all relevant information given onto CASEBOOK using BUDGET PLAN to meet the monitoring and evaluation requirements of the Money Advice Service.

Performance targets and quality standards

- To meet the individual performance targets set for debt caseworkers (daily, weekly, monthly and annually) and ensure that the advice given meets the quality standards of:
 - the AQS general help level quality standard
 - the Citizens Advice quality assurance scheme
 - the Money and Pensions Service quality framework.
- To inform the Operations Manager where performance targets are at risk of not being met and any valid mitigation for under-performance.
- Provide regular reports and feedback to the Operations Manager as required.
- Identify solutions to resolve any under-performance on targets and engage positively in discussions with the Operations Manager to achieve the required levels.

Working in Partnership

- To work in collaboratively with partner agencies, local authority and other local statutory and voluntary organisations in order to increase access to the service and to the range of support and advice needed according to individual circumstances.
- To make appropriate referrals in-line with documented procedures: to key partner agencies, for example National Debt Line/Step-Change who may be better placed to provide debt management and other valid solutions for clients or to other advisers or specialist agencies as appropriate where there are other related problems such as employment and consumer etc.

Social policy and monitoring

- Assist with social policy work by providing information about clients' circumstances through the appropriate channel.
- Liaise with statutory and non-statutory organisations and represent the Service to outside bodies as appropriate.

Administration

- Maintain and monitor effective and efficient administrative systems.
- To be self-administrating and comply with existing practices, policies and procedures.

Service development

- To undertake recommendations from your line manager with regards to planning and developing the debt service in order to meet specific contract requirements.
- To produce information, reports and materials relevant to effective money advice strategies as and when required.
- To assist with the promotion of the debt service to the wider community.

Other duties and responsibilities

- With the support of your line manager, Identify and address your training and development needs.
- Advise the line manager on staffing and service delivery and performance issues.
- Attend regular meetings of paid and unpaid staff.
- Carry out any other tasks which may be within the scope of the post to ensure the effective delivery and development of the service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Demonstrate a commitment to the aims, principles and policies of the CA service and the implementation of its Equal Opportunities policies.

DEBT CASEWORKER

PERSON SPECIFICATION

1. Knowledge and experience of complex debt casework, covering priority and non-priority debt advice, options and insolvency solutions
2. Experience of achieving performance and quality targets/KPIs.
3. Ability and willingness to undertake training and development to comply with MaPS Caseworker accreditation and Citizens Advice quality standards.
4. Effective oral and written communication skills.
5. Numerate to the level required by the tasks.
6. Ability to prioritise own work, meet deadlines, manage workload and targets in a pressured environment.
7. Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
8. IT literate with an ability to use software packages including Microsoft Office products in the provision of advice and preparation of formal written materials.
9. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
10. Ability and willingness to work as part of a team.
11. Ability to identify social policy issues and to submit reports as appropriate
12. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equity and diversity policy
13. Ability to travel to and work from different sites within Peterborough
14. Institute of Money Advisers Certificate in Money Advice Practice or MaPS Caseworker accreditation equivalent.