Money Advice Caseworker Job Pack

Thanks for your interest in working at Citizens Advice Bucks. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Overview of Citizens Advice Bucks
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?
If you want to chat about the role further, you can contact Iram by contacting Iram.Rashid@cabucks.org.uk

About Citizens Advice Bucks:

As of April 2021, Citizens Advice Chiltern, Aylesbury Vale and High Wycombe came together to form Citizens Advice Bucks, an independent and volunteer-based charity which provides a free and accessible advice and information service to clients across Buckinghamshire.

We can all face problems that seem complicated or intimidating. At Citizens Advice Bucks we believe no one should have to face these problems without good quality, free, independent advice. That's why we're here: to give people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.

You will be joining a supportive team of over 50 staff and around 100 volunteers all determined to do our best for our clients. Our core values are that we are client-centred, friendly, kind, professional and that we respect our clients, ourselves and each other.

Citizens Advice Bucks is an equal opportunities employer. We value diversity, promote equality and challenge discrimination. We encourage and welcome applications from suitably skilled candidates from all backgrounds.

The role

- Deliver good quality debt advice service to clients, with due regard to the aims, policies and procedures of the organisation and service, working within a client focussed and responsive team.

citizens advice Bucks

- Taking action on behalf of clients where required in order to further their issues in the direction of a sustainable debt resolution method.

Role Profile

Service Delivery

- Provide a full range of debt advice, including casework, to the client meeting FCA and MaPs standards. Identifying the debt issue through to its resolution, delivering advice and/or casework through a mixture of channels. (Predominantly digital and telephone moving to face to face for most complex/most vulnerable clients).
- Sensitively explore the client's situation, including household and financial circumstances. Identify areas where clients could maximise income through a range of charitable/government options and reduce expenditure through budgeting support.
- Provide information and advice to empower clients to act on their own behalf, including signposting to other agencies where appropriate.
- Contribute to the efficient working of the team in delivering against the project requirements, ensuring project specific action is carried out.
- Engage with team members, sharing knowledge and good practice and supporting each other to problem solve
- Record outcomes, financial and otherwise, to all client's case records to meet projects KPIs.
- Set up and maintain casework and other admin systems as required. Maintain client records to required standards on the organisation's management information system.
- Ensure clients are encouraged to feedback on the service they receive. Share with management and team for continuous development of service delivery

Discrimination

- Identify if there is any question of discrimination and be aware of the organisation's procedures for dealing with actual and potential discrimination issues.

Research and campaigns

- Identify research and campaigns issues and assist with research and campaigns work by providing information about clients' circumstances through the appropriate channel.

Professional development

- Keep up to date with legislation, policies and procedures and undertake appropriate training.

Other

- Support the aim and principles of the Citizens Advice service and its equity and diversity policies
- Perform any other tasks commensurate with the role, as directed by a Senior Manager.

citizens advice Bucks

Person specification

Experience

1. Current knowledge and experience of Money Advice at Casework level and ability to carry a money advice caseload. Candidates with debt advice experience below the required casework level may be considered for the role of Trainee Caseworker.

2. **Skills and abilities**
   3. Ability to manage debt advice caseload, progressing cases from initial assessment through to sustainable resolution using holistic approach to client situations, identifying wider issues and opportunities for income maximisation, cost reduction and financial resilience.
   4. Ability to deliver accurate, structured and high-quality advice in line with Citizens Advice standards and FCA debt advice best practice
   5. Ability to provide advice across multiple channels (telephone, digital and face-to-face), adapting delivery to meet client needs and vulnerability
   6. The ability to prioritise tasks and work to deadlines using own initiative communicating effectively, both orally and in writing with a range of people and organisations.
   7. The ability to work effectively and collaboratively as part of a team and work without close supervision.
   8. Strong IT skills, including use of case management systems and digital tools for advice delivery, record keeping and reporting
   9. Commitment to continuous professional development, including keeping up to date with legislation, policy and best practice including willingness to undertake training and adapt to changes in service delivery
   10. Ability to engage in feedback sessions on case handling and progression.
   11. Ability to work in a sensitive, enabling and non-judgemental way with people from a wide range of backgrounds. Ability to maintain confidentiality and appropriate professional boundaries
   12. Willingness to work from multiple office locations to support clients from their local office.

Desirable

13. Certificate of Money Advice practice
14. DRO intermediary status & Advocacy and court representation

Terms and conditions

Job Title: Money Advice Caseworker

Location: Aylesbury, Chesham & High Wycombe

citizens advice Bucks

Hours:	**34 hrs/week available**
Salary:	**£24,750 - £27,000 FTE Dependent upon experience**
	Pro rata: £22,744 - £24,810
Duration:	**Permanent**
Closing date:	**Assessment and interview dates will be arranged as applications are received, and we reserve the right to close the role early if the right candidate is found**

What we give our staff

- Employer Pension Contribution.
- A company that is committed to its employees, valuing their knowledge, creativity, and flexibility.
- Ongoing personal training and development.
- The chance to work with amazing people and a nationally recognised charity.
- 25 days leave (plus statutory bank holidays) pro rata per year
- Contractual Sick Pay policy (Once probation period is passed)
- Travel expenses paid when working away from your “base office”.
- All and more outlined in our staff handbook