



Job Title:	Money and Debt Advice Specialist Caseworker
Hours:	37
Salary:	£26,076 - £28,050 for MaPs experienced caseworker £23,695 - £25,695 for debt adviser without MaPS experience
Pension:	3% employer contribution
Responsible to:	Client Services Manager
Based at:	Hybrid (home and office based)
Job Share:	May be considered

Primary Purpose

To support the local community through the provision of Money and Debt Advice.

The role requires a money advice caseworker who is highly organised, efficient and very experienced in delivering client numbers targets within a quality assured framework and the requirements of the Financial Conduct Authority.

This post is funded by the Money and Pension Service (MaPS) through a partnership with National Citizens Advice.

The post will be based at our Yeovil offices and will include pre-arranged client appointments at various other locations in the area by prior arrangement.

Key Tasks

Provision of Advice and Casework

1. Provide money advice and casework covering the full range of priority and non-priority debt and money advice issues
2. Identify urgent situations and ensure any possible action is taken immediately
3. Assist clients in the maximisation of their income including making applications for grants and other schemes where relevant
4. Work with the client to draw up an agreed financial statement incorporating the Standard Financial Statement

5. Enable clients to identify and explore various options they may have in addressing their situation explaining the consequences and limitations of each option
6. Assist clients in the calculation of offers to priority and non-priority creditors with reference to their Financial Statement. Where appropriate undertake negotiations with clients' creditors and other relevant bodies and/or act for the client by drafting or writing letters and telephoning and negotiating with third parties as necessary
7. Prepare and present cases to the appropriate statutory bodies and courts as required
8. Maintain timely, accurate and detailed case records and adhere to administration systems
9. Maintain statistical information and other required documents and undertake client feedback surveys and facilitate client evaluation
10. Manage a full caseload of debt and money advice cases. (Approximately 5- 7 new client starts a week)
11. Ensure all work casework conforms to Operational Policy including meeting the requirements of the Advice Quality Standard, FCA and MAPS
12. Provide basic welfare benefits advice to clients, to include assessing eligibility for benefits, better-off calculations and other income maximisation advice
13. Assist clients with other problems which are an integral part of their case, referring to other advisers and/or agencies as appropriate
14. Provide representation for clients at county or magistrates courts when appropriate
15. Provide support, guidance and supervision to the money advice trainee caseworker/caseworker's assistant

Research & Campaigns and Monitoring

1. Identify and take-up research and campaigns issues, of both local and national importance
2. Provide reports periodically to the Client Services Manager and trustee board

Professional Development

1. Keep up to date with legislation, case law and procedures relating to money and debt advice issues and undertake the annual mandatory professional development training
2. Engage effectively with supervision, appraisal and individual file review to improve your performance and advance your professional development
3. Assist in initiatives to improve services

Other Duties

1. Uphold the aims and principles of the Citizens Advice service and its equal opportunities policies
2. Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
3. Establish and maintain effective and efficient administration systems for the delivery of the service
4. Support other Citizens Advice work as required
5. Carry out any other duties as requested

Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the job and is not included to be an inflexible list of tasks.

Shortlisting and interview selection will be conducted using information provided in the application and during the interview. The Selection Matrix Criteria indicate which of both options apply to each aspect of the Person Specification

	Person Specification	Selection Matrix
1	Qualified and competent money advice and debt caseworker holding the relevant accredited quality standard and other competencies set down by Advice Quality Standard, Money and Pension Service, FCA and/or Institute of Money Advisers	Essential Application form
2	Demonstrable and thorough understanding of the application of the debt process in a busy advice organisation and of doing so in an ordered and efficient way including through a Money Advice Service (nka MAPS) funded programme	Essential Application form
3	Hold a current registration as a DRO intermediary	Desirable Application form
4	A positive approach to quality of advice audit (including peer review and external audit) and a commitment to constructive feedback as part of the quality assurance and learning process (as a recipient and as a supervisor)	Essential Application form and Interview
5	The ability to sift through large amounts of information and gather essential details during a client interview	Essential Application form and Interview
6	Excellent negotiation skills with experience of conducting negotiations with a range of agencies and creditors	Essential Application form and Interview
7	Proven ability to plan and prioritise your workload, meet deadlines and work calmly and with focus within a busy and fast paced environment	Essential Application form and Interview
8	Experience of using a casework recording and quality assurance system and IT platforms	Essential Application form
9	Experience of providing effective guidance and support to peers and junior colleagues and the ability to plan and co-ordinate the workload of others	Desirable Application form and Interview
10	Experience of working effectively within a team including paid and volunteer staff	Essential Application form and Interview
11	Excellent communication skills (spoken and written) and the ability to develop and maintain positive, professional, working relationships with clients, funders, stakeholders, colleagues, volunteers, creditors and other agencies	Essential Application form and Interview
12	Proven IT skills including very confident and competent use of Word, Excel, databases, cloud-based systems etc to maintain effective records, administrative and reporting systems	Essential Application form and Interview
13	Understanding of and a commitment to the aims and principles of Citizens Advice South Somerset	Essential Application form
14	Literate and numerate with a level 2 equivalent qualification	Essential Application form
15	A commitment to travelling to various locations as required	Essential Application form