

**Money Advice Caseworker**

**Reports to:** CAL Debt Supervisor, Line Manager

**Contract Type:** Permanent

**Working Hours:** 35 hours per week (Full-Time)

**Location:** Leemore Lewisham – might be required to work from different locations (outreach)

**Salary:** £27,000- £30,000 per annum, depending on experience

**Job purpose:**

1. To provide over-indebted Londoners with free, face-to-face advice that is accurate, effective and tailored to individuals’ circumstances

2. To maintain detailed case records

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

Main duties and responsibilities:

1. To provide over-indebted Londoners with free, face-to-face advice that is accurate, effective and tailored to individuals’ circumstances, including:

∙ 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

2. To maintain detailed case records this includes:

∙ Ensuring that all work meets all auditing and quality standards and the requirements of the funder

∙ Ensuring all case records are written up in a timely manner

3. Keep up to date with legislation, policies and procedures and undertake appropriate training, including:

∙ 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

4. Contribute to team

∙ Work to an agreed work-plan, meeting targets and milestones

∙ Prioritise and manage your own workload

∙ Be an active member of the team, identifying opportunities for your own development

∙ Compliance with CAL policies and procedures, including health and safety

∙ Demonstrate financial efficiency and value for money throughout work

∙ Ensure that all services comply with equal opportunities and other relevant policies and quality standards and good practice

5. Other

∙ Undertake additional tasks as defined by the CEO and Line Manager

**Person specification:**

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| **Attributes and Behaviours** | |
| Understanding of and commitment to the aims and principles of the Citizens Advice service and its equality and diversity policies. | Essential |
| An ordered approach to casework and an ability to follow set procedures concerning casework and file management to achieve the expected standard required of the role. | Essential |
| Effective oral communication skills with particular emphasis on negotiating and representing. | Essential |
| Effective writing skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence. | Essential |
| Numerate to the level required in the tasks. | Essential |
| Understand the issues involved in interviewing clients. | Essential |
| Ability to remain non-judgmental. | Essential |
| Ability to provide outstanding customer service. | Essential |
| Ability to prioritise own work, meet deadlines and manage caseload. | Essential |
| 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 | Essential |
| Ability to give and receive feedback objectively and sensitively | Essential |
| Understanding of the debt advice model with proven casework skills and experience of dealing with complex and challenging cases | Essential |
| A commitment to continuous professional development, including a willingness to develop knowledge and skills in advice topics | Essential |
| **Knowledge and Experience** |  |
| Previous experience of providing debt advice in non-for-profit organisations. At least one year, or equivalent, competencies in debt advice | Essential |
| Hold a valid Money Advice Service accredited qualification in debt advice to level three, or higher | Essential |
| Citizens Advice Certificate in generalist advice work | Essential |
| Experience of delivering high quality advice, casework and financial capability sessions to meet targets whilst ensuring collection of data to support funder’s monitoring and reporting requirements | Essential |
| 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 | Essential |
| Hold a Certificate in Money Advice Practice (Cert MAP) from the IMA in partnership with Staffordshire University | Desirable |