



Job Description

POST: Money Advice Caseworker

LINE MANAGER: Advice Services Manager

ROLE: To provide an effective and efficient money advice casework service to clients, including income maximisation and budgeting advice.

Part time: 18.5hrs / week

Salary: £ 21,269 - £26,975 (pro-rata) depending on experience

Closing date: 20th November

KEY WORK AREAS:

Casework

- Interview clients and advise them of their rights and responsibilities.
- Explore options and implications to enable clients to make informed decisions.
- Ensure income maximisation through the take up of appropriate benefits.
- Prepare financial statements and make offers to creditors.
- Negotiate with third parties on behalf of clients.
- Liaise with referral agencies, including health professionals.
- Advocate for the client where necessary by calculating, negotiating, drafting or writing letters, telephoning and making grant applications.
- Assist clients with other related problems which are an integral part of their case and refer to other advisers or agencies as appropriate.
- Prepare necessary paperwork and present cases to the relevant statutory bodies, tribunals and courts as appropriate.
- Maintain clear and accurate case records.
- Provide statistical information as required.
- Ensure that all work conforms to the Citizens Advice systems and procedures.
- Manage and maintain referral pathways from internal sources and external stakeholders, including local authority departments.
- Ensure casework activities meet the expectations set by the Financial Conduct Authority (FCA).

Research & Campaigns

- Assist with research & campaigns work, by identifying and reporting unfair and emerging issues.
- Alert other staff to local and national issues.

Professional Development

- Undertake appropriate training, including continuing professional development for the money advice qualification you will hold.
- Keep up to date with legislation, case law, policies and procedures relating to money advice & relevant housing law.
- Read relevant publications.
- Prepare for and attend supervision sessions/team meetings, management team meetings as appropriate.

Administration

- Confident use of Microsoft Office applications and case management databases.
- Keep up to date with policies and procedures relevant to bureau work and undertake appropriate training.

Other duties and responsibilities

- Demonstrate commitment to the aims and policies of the Citizens Advice service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

Person specification

Essential:

- Understanding and commitment to the aims and principles of Citizens Advice and its equal opportunities policy.
- Be highly numerate.
- Ability to communicate effectively, verbally and in writing, with a particular emphasis on negotiation and representation.
- 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.
- Flexible approach and willingness to work as part of a team.
- Ability to work on own initiative, prioritise own work, meet deadlines and manage caseload.
- Produce statistical data as requested to meet funding specifications.
- Ability to research, identify options and present complex information to clients, some of whom may have mental and physical health issues.
- Confident use of Microsoft Office applications and case management databases.
- Ability to work on own initiative and to be self-servicing with administrative tasks.
- Commitment to continuing professional development.

Desirable:

- Trained Citizens Advice adviser with at least 2 years' experience or ability to demonstrate sufficient knowledge and understanding of Citizens Advice processes.
- Authorised Debt Relief Order (DRO) Intermediary or be able and willing to train to become an authorised DRO Intermediary.
- An understanding of insolvency legislation and processes.
- The holding of the IMA Certificate in Money Advice Practice (CertMAP).
- Confident use of benefit checking applications.
- Experience delivering financial capability initiatives

Application: Please send CV and cover letter to servicemanager@lewesdistrictca.org.uk by 20th November 2023