

Money Advice Caseworker

Job Pack

Thank you for your interest in working at Citizens Advice 1066 (CA1066). This job pack should give you everything you need to know to apply for this role and what it means to work in the Citizens Advice service.

In this pack you'll find:

- Our values
- 3 things you should know about us
- How the Citizens Advice network works
- Information about the organisation, team and the role
- The role profile and person specification
- The benefits of working for the organisation
- Our approach to equality and diversity.
- Guidance notes for applicants



Need more information?

If you have further questions about the role, you can call 01424 721420 or contact us at recruitment@citizensadvice1066.co.uk



To apply

Please complete the application form **in full** and return to recruitment@citizensadvice1066.co.uk

We will have multiple interview dates for this role.

Please note that we **do not** accept CVs.

Citizens Advice 1066

As a member of the Citizens Advice service, CA1066 provides free, confidential, independent and impartial advice and information to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

We are committed to putting equality and equity at the heart of everything that we do, with the overarching aim of being the go-to charity for anyone in our borough in need of help, to find a way forward. This means we look at improving access, treating people with empathy and promoting an inclusive working environment for all of our colleagues.



Our values

We're inventive - We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous - We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible - We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

Three things you should know about us

We're local and we're national

CA1066 has offices in Hastings and Bexhill, deliver outreach sessions for clients across Rother District, and give energy advice across East Sussex, in partnership with other local Citizens Advice. The Citizens Advice service is made up of Citizens Advice – the national charity – and a network of over 250 local Citizens Advice members across England and Wales.

We're here for everyone

Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

We're listened to - and we make a difference

Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

How Citizens Advice works

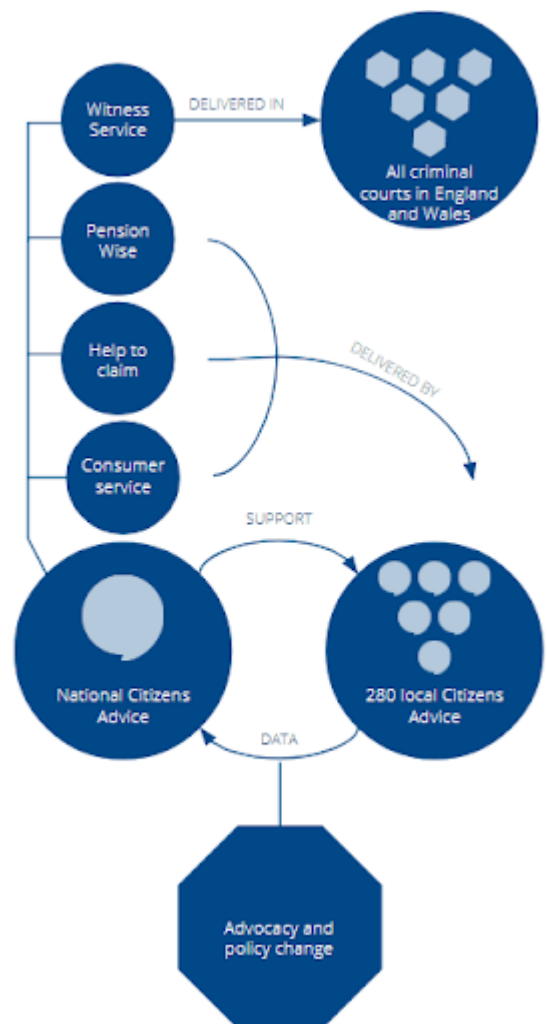
The Citizens Advice network delivers services from:

- Over 600 local Citizens Advice outlets
- Over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 7,700 local staff
- Over 21,300 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30-minute drive of where they live.



The role and our team

The role you're applying for is: **Money Advice Caseworker**

The role will report to our Operations Manager.

You can find out more about us via:

- The [Citizens Advice 1066 website](#)
- The [national Citizens Advice website](#) and the Citizens Advice [Campaigning site](#).

The application process

1. Download the application pack (this document) and application form from the Citizens Advice 1066 website
2. Complete the application form in full, and submit it by email to recruitment@citizensadvice1066.co.uk in time for the closing date.
3. We will invite applicants who meet the required standard for an in-person interview at our office in St Leonards.
4. Applicants will be notified of the outcome of their application.

The Role

Role	Money Advice Caseworker
Salary	Qualified Money Adviser £33,882.62 per year FTE Trainees £32,294.38

	per year FTE
Hours	37 hours
Location	Based in the Citizens Advice 1066 office in St Leonards-on-Sea with regular working from other local Citizens Advice offices across East Sussex.
Reporting to	Operations Manager
Contract type	Permanent

Context of role

To work as part of the specialist Money Advice Team within Citizens Advice 1066. You will work with financial inclusion and general advice colleagues. Training can be provided to someone with the relevant experience.

Role purpose

To work within the specialist team to help people resolve their debt problems, and to carry out Money Advice work in East Sussex.

At CA1066, we value diversity, promote equality and challenge discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from racial minority communities.

Role Profile

Main responsibilities	Key Tasks	Time %
Casework:	<ul style="list-style-type: none"> • Provide casework covering the full range of money advice. • Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning. • Negotiate with third parties as appropriate. • Ensure income maximisation through the take up of appropriate benefits. • 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 • Make home/outreach visits as necessary. • Provide advice and assistance to other staff across the whole range of debt issues. • Ensure that all casework conforms to the Citizens Advice Quality standard and Financial Conduct Authority Guidelines. • Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation. • Ensure that all work conforms to the organisation’s systems and procedures. 	60%
Social Policy:	<ul style="list-style-type: none"> • Assist with social policy work by providing information about client’s circumstances. • Provide statistical information on the number of clients and nature of cases and provide regular reports to the management team as required. • Monitor service provision to ensure that it reaches the widest possible client group. • Alert other staff to local and national issues. 	5%
Professional development:	<ul style="list-style-type: none"> • Keep up-to-date with legislation, case law, policies and procedures relating to money advice and debt and undertake appropriate training. • Read relevant publications. • Attend relevant internal and external meetings as agreed with the line manager. • Prepare for and attend supervision sessions/team meetings/management team meetings as appropriate. • Assist with Service initiatives for the improvement of services. • Make home/outreach visits as necessary 	10%
Administration:	<ul style="list-style-type: none"> • Undertake administrative work in support of your cases and the smooth running of the money advice service • Use IT for statistical recording, record keeping and document production. • Keep up-to-date with policies and procedures relevant to the role and undertake appropriate training. • Attend internal and external meetings as agreed with line manager. • Maintain close liaison with relevant external agencies. • Maintain a library of reference material and case law. 	20%

Other duties, responsibilities and requirements:	<ul style="list-style-type: none"> • Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service. • 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. 	5%
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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 role and is not included to be an inflexible list of tasks.

Person specification:

1. Knowledge and experience of money advice and debt and hold a certificate in Money Advice Practice. Ideally you will already be an experienced DRO intermediary or be willing to train for the role.
2. Experience of working with people in challenging life circumstances.
3. Effective oral communication skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
4. Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
5. Understand the issues involved in interviewing clients.
6. Numerate to the level required in the tasks.
7. Ability to prioritise own work, meet deadlines and manage a caseload.
8. Ability to use IT in the provision of advice and the preparation of reports and submissions.
9. Ability to give and receive feedback objectively and sensitively and a willingness to work as part of a team.
10. Ability to monitor and maintain own standards.
11. Demonstrate understanding of social trends and their implications for clients and service provision.
12. Demonstrable knowledge and understanding of the needs of people from diverse social/cultural and racial backgrounds and with a wide range of abilities
13. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equal opportunities policies.
14. Able to work independently.

Key Competencies

- Meeting Customers' Needs
- Working Well Together
- Planning and Organising
- Achieving Quality Solutions
- Problem solving and Decision-making
- Understanding the Business and its Environment

What we give our staff

We value the people who work here - and we show that in what we offer. As well as things like annual leave and our workplace pension, working at Citizens Advice means getting access to many benefits.

- A 37 hour (full time) working week, with a Time Off In Lieu (TOIL) system
- 20 days holiday entitlement (in addition to bank holidays), pro-rata for part time
- 3% employer contribution pension scheme
- Access to a mental health and wellbeing service that offers anonymous, confidential support 24 hours a day, 365 days a year
- Central locations in Bexhill and St Leonards, with good access to public transport.
- Opportunities to engage in both personal and professional development

Equality and diversity at Citizens Advice

We are fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

We judge the application, not the person. The selection panel won't see your personal details. This makes sure each person's response is judged on its merits and not on their background.

Additional information

Please see the [CA1066 website](#) for information on the following:

- Disability
- Entitlement to work in the UK
- Diversity monitoring
- GDPR: How we will use your information
- References
- Criminal Convictions/DBS

Guidance Notes for Applicants

Our recruitment process is competency-based. The purpose is to assess how closely your skills and experience, including voluntary and wider life experience, relate directly to the skill areas set out in the Admin Officer person specification. The person specification is included in the job description. For each bullet point we are looking for evidence that you meet it through experience or that it would be a logical next step on what you have achieved previously. The best applications will give examples of what you have done rather than respond on an abstract or theoretical basis. The key competencies list shows the broad areas which apply to

this role. There is no need to write examples against the points in this list. We will use your responses to the person specification to inform our assessment against the competencies.

We wish you every success in your application, and thank you for taking the time to consider joining us.