



**Bournemouth  
Christchurch  
& Poole**

# **Title: Money Advice Service Caseworker**

## Job pack

Thanks for your interest in working at Citizens Advice Bournemouth Christchurch and Poole. 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:

- Our Aims and Values
- 3 things you should know about us.
- Overview of Citizens Advice and Citizens Advice Bournemouth Christchurch & Poole
- The role profile and personal specification
- Terms and conditions
- What we give our staff

### **Want to chat about this role?**

If you want to discuss the role further, you can contact us by emailing [dan.stannard@citizensadvicebcp.org.uk](mailto:dan.stannard@citizensadvicebcp.org.uk)



## Our Aims

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect peoples lives

We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities.

We value diversity, promote equality and challenge discrimination



## 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.



## 3 things you should know about us

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.

**2. 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.

**3. 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 Bournemouth Christchurch & Poole works

Every year thousands of people come to us for advice and help with solving their problems.

We're here for everyone and help with problems like managing debt or household bills, understanding rights at work or housing issues. We also provide specialist services in welfare, benefits and debt.

Our projects include Macmillan Cancer support, Pension Wise, EU Settlement Scheme, Hate Crime, multiple specialist Benefits and Debt services.

We're an important part of this community, with 4 offices across Bournemouth Christchurch and Poole, where people need us.

Through our daily interaction with clients, we have a credible understanding of local needs. We use our data and insight to tailor our services, as well as help improve policies and practices locally.

Putting our clients' needs at the heart of decision-making means we also work in partnership, making it easier for clients to access relevant services.

We're also part of the Citizens Advice service. This means we share knowledge and best practice so that people can expect a quality service.

Together we work to fix the underlying causes of people's problems using evidence gathered from across our network. Because of this we save society money.

Last year we helped people with over 29,000 issues through face to face, telephone and webchat.

# Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 280 local Citizens Advice members.

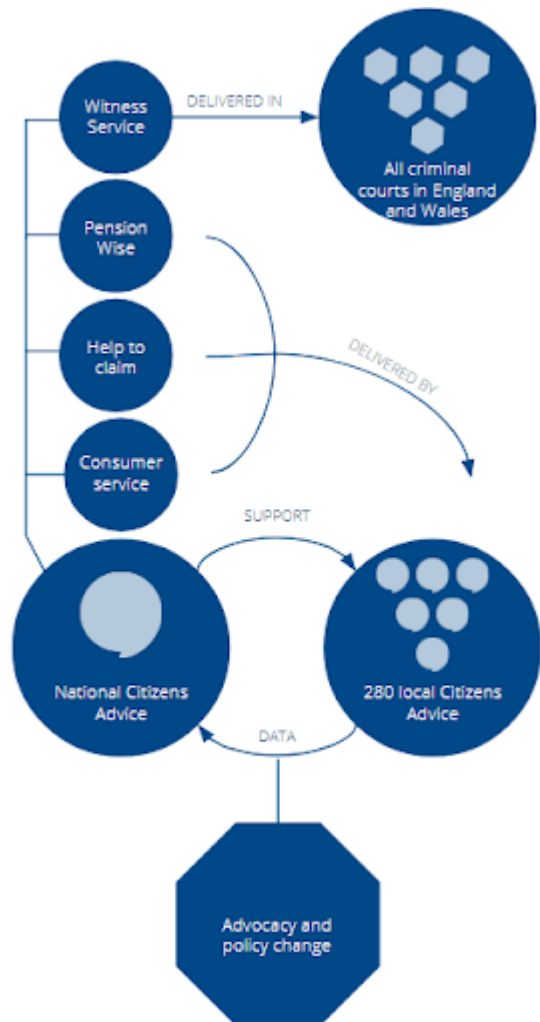
This role sits our network of independent charities, delivering services from

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

They do this with:

- 6,500 local staff.
- over 23,000 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

The successful candidate will deliver debt advice as part of Citizens Advice Money Advice Service (MAS) team and offering advice and assistance to clients to deal with priority/non-priority debt, income maximisation and support through the insolvency process.



## Role profile

### Casework:

- Ensure accurate financial records are kept in line with the financial processes and procedures
- Provide casework covering the full range of debt advice and financial capability.
- 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.
- Support clients through the insolvency process such as Debt Relief Order (DRO) and Bankruptcy application.
- 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.
- Provide advice and assistance to other staff across the whole range of debt & financial capability issues.
- Ensure that all casework conforms to the Local Citizens Advice Office Manual and the Citizens Advice Quality standard. Adhere to casework requirements required by the Money Advice Service. This will incorporate ensuring all appropriate letters and advice is FCA compliant.
- Maintain case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation. Case records will also need to reflect the requirements of the Money Advice Service and Debt Advice Peer Assessments for audit purposes.

### Research and Campaigns:

- Assist with social policy work by providing information about clients' circumstances.
- Provide statistical information on the number of clients and nature of cases and provide regular reports to management.

- Monitor service provision to ensure that it reaches the widest possible client group. In particular, to meet the MAS target group as stipulated.
- Alert other staff to local and national issues.

### **Professional development:**

- Keep up to date with legislation, case law, policies and procedures relating to debt, money advice & financial capability 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.
- To keep training records and fulfil the requirements of Citizens Advice continuous professional development (CPD) scheme.
- To study and sit the Institute of Money Advice examination when appropriate, and fulfil the requirements of the IMA CPD scheme

### **Administration:**

- Review and make recommendations for improvements to services.
- Use IT for statistical recording, record keeping and document production.
- Keep up to date with policies and procedures relevant to Citizens Advice work and undertake appropriate training.

### **Public relations:**

- Liaise with statutory and non-statutory organisations and represent the service to outside partners as appropriate.

### **Other duties and responsibilities**

- 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.



## Person specification

1. Significant recent experience as a debt adviser with direct involvement in advising clients on debt issues and income maximisation including drawing up financial statements and negotiating with creditors etc.
2. Qualified as a DRO intermediary or willing to train to become one
3. Effective oral communication skills with particular emphasis on negotiating and representing.
4. Effective writing skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
5. Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
6. Understand the issues involved in interviewing clients.
7. Numerate to the level required in the tasks.
8. Ability to prioritise own work, meet deadlines and manage caseload.
9. Ability to use IT in the provision of advice and the preparation of reports and submissions.
10. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
11. Ability and willingness to work as part of a team.
12. Ability to monitor and maintain own standards.
13. Demonstrate understanding of social trends and their implications for clients and service provision.
14. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equality and diversity policies.



## Terms and conditions

A copy of our Terms and Conditions will be provided on successful appointment



## What we give our staff

We offer ongoing training and support, generous annual leave, access to online health/wellbeing resources, an Employee Assistance Programme and employers pension contribution.