



Trainee Money Advisor - £19,260 actual | 28 hours

Job pack

Thank you for your interest in working at Citizens Advice Sefton. 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 will find:

- Information about Citizens Advice Sefton
- The role profile and personal specification
- Terms and conditions
- What we offer to our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Sandra Penketh by emailing sandra.penketh@seftoncab.org.uk



As users of the disability confident scheme, we guarantee to interview all disabled applicants who meet the minimum essential criteria for the vacancy. We welcome applicants from diverse backgrounds e.g. the LGBT+ community and ethnically diverse backgrounds.

Citizens Advice Sefton

Citizens Advice Sefton is situated in Merseyside, neighbouring Liverpool, Knowsley and West Lancashire. Originally established in Bootle in 1939, the service merged offices across Sefton to become a single borough wide service in 2008. We have permanent offices in Bootle and Southport, but we also work in partnerships across Sefton in community organisations. Sefton is a very diverse borough in socio economic terms with multiple wards categorised as among the most deprived wards in England alongside wards categorised as the least deprived (and most wealthy) in England in the Indices of Deprivation.

We employ 30 people, and we have 50 volunteers. Around 70% of enquiries are related to benefits and debt. We have a money advice team funded by the Greater Merseyside Money Advice Partnership (GMMAP) via a service level agreement with The Money Advice and Pension Service. We are also funded by Public Health in a multi-agency partnership led by Sefton Council for Voluntary Service – Living Well Sefton. Our welfare rights teamwork within this network and we also work within foodbanks, community groups and Clock View, a mental health hospital. Our aim is to tackle poverty and social injustice. We have recently added a housing outreach advice service as housing issues are becoming more prevalent in Sefton. We work with Citizens Advice Liverpool to provide a tribunal representation service. In addition, we also provide a wellbeing mentoring service, financial resilience and energy advice.

We recruit local volunteers who train as assessors, advisers, admin, reception and support roles or who undertake research and campaigns work based on client evidence. Our Board of Trustees are also volunteers.



JOB Description



The role

Do you want to help people who are struggling with the cost-of-living crisis and who have money issues? Do you want to achieve real outcomes that give you job satisfaction?

We are looking for a trainee adviser to join our existing team of passionate and dedicated advisers, caseworkers, and financial capability workers to help people in Sefton with the problems they face.

We are looking for someone who has the ability to provide an effective and efficient specialist debt casework service where you will be identifying and putting in place debt management and debt avoidance solutions.

You will be supported through a structured training programme provided by Community Money Advice (CMA) with our Money Advice Team Supervisor supporting you to achieve a Level 4 Award in Casework/Specialist Debt Advice.

The post holder role may need to operate from various office sites within Sefton, conducting advice sessions in outreach locations such as job centres, mental health settings, and community venues as necessary. Their primary responsibility is delivering a comprehensive debt advice service to the public. Collaboration with the welfare rights and money advice teams at Citizens Advice Sefton and partners from Living Well Sefton, including mentors and neighbourhood partners, is integral to this position.

This post is funded through a partnership across the city region; The Greater Merseyside Money Advice Partnership (GMMAP) which is supported by The Money and Pensions Service (MaPS).



Job Description

Advice giving

- 1 Interview clients using sensitive listening and questioning skills to allow clients to explain their problem(s) and empower them to set their own priorities.
- 2 Research and explore options and implications so that clients can make informed decisions.
- 3 Act for the client where necessary by calculating, negotiating, drafting or writing letters, telephoning and representation at appeal.
- 4 Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
- 5 Ensure that all work conforms to the office manual and the Quality Standards as appropriate.
- 6 Maintain detailed online case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

Research and campaigns

- 7 Assist with social policy research and campaigns work by providing information about clients' circumstances via appropriate channels
- 8 Alert clients to research and campaigns options.

Professional development

- 9 Keep up to date with legislation, policies and procedures and undertake appropriate training.
- 10 Read relevant publications and attend relevant internal and external meetings as agreed with the line manager.

Administration

- 11 Use IT for statistical recording of information, for record keeping, document production, research and campaigns and funding requirements.
- 12 Ensure IT information assurance training is completed on an annual basis.
- 13 Ensure that all work conforms to our systems and procedures.
- 14 Provide statistical information on the number of clients and nature of cases.

Other duties and responsibilities

- 15 Complete the required training to comply with quality assurance processes.
- 16 Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
- 17 Demonstrate commitment to the aims and policies of the CAB service.
- 18 Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.



Person specification

Person Specification	
Essential Criteria	
1	Committed to developmental training in money advice.
2	Knowledge and experience of the advice or financial sector and working to quality standards and funders requirements.
3	Effective oral & written communication skills with emphasis on negotiation, representing and preparing reviews, reports & correspondence.
4	Ability to prioritise own work, meet deadlines and targets, manage caseload, monitor and maintain own standards
5	Ability to work as part of a team, to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
6	Ability to use IT Systems in the provision of advice, Case Recording, preparation of reports and submissions
7	Understanding of the importance of research and campaigns / key current social issues, and their impact on clients and the role the completion of associated evidence forms.
8	Good level of IT skills. Experience in using CRM systems, digital appointment-booking systems, e-mail, and ability to maintain an electronic diary.
9	An understanding of and a commitment to the active promotion of equal opportunities and anti-discrimination, including an ability to relate appropriately to members of other cultures or disadvantaged groups.
10	Understanding of and commitment to the aims and principles of Citizens Advice, the GMMAP service and its equal opportunities policies.
Desirable Criteria	

11	Have current Debt Relief Order Approved Intermediary status. (If not, you must be willing to work towards this)
12	A willingness and commitment to work evenings and some weekends if necessary

In accordance with Citizens Advice national policy the successful candidate may be screened by the Disclosure and Barring Service (DBS). However, a criminal record will not necessarily be a bar to your being able to take up the job.



Terms and conditions

Salary £19,260 actual (£24,074 FTE)

Hours 28 per week

Contract type: Permanent

Annual Leave: 28 days plus Bank Holidays (part time pro-rata)

Location: Based in Sefton and you will be expected to cover outreach settings.

Office hours: Mon – Fri 9am – 5pm (part-time days and times to be agreed)

What we offer to our staff

- Generous annual leave of 28 days (pro rata if part time) plus bank holidays
- 7% employer contribution pension
- Cycle to Work Scheme
- Free VDU eye care test
- Professional and advice sector recognised training

For an application pack go to <https://seftoncab.org.uk/jobs/> or email recruitment@seftoncab.org.uk or telephone 0151 282 5650 for paper copies. Application is via application form

Please note: **Closing date for applications: 12pm Monday 12th February 2024**

You will be contacted by email or telephone if you are shortlisted for interview. Interviews: Will be held on **Monday 19th February 2024** in our Southport Office.