



Mind and Money Keyworker

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. Only Kensington and Chelsea have a starker contrast between wealth and deprivation in one borough.

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

We are looking for an experienced 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.

The post holder may be required to work from other office locations in Sefton and will deliver advice sessions in outreach locations such as job centres, mental health settings and community venues as required. The adviser will provide a general advice service to members of the public; however, welfare benefits and debt are the dominant areas of advice needed. You will play a crucial role in improving the financial wellbeing of clients by ensuring they receive the correct welfare benefits, identifying and making grant and trust fund applications, and advising on income maximisation options. The adviser will work closely with the welfare rights and money advice teams in Citizens Advice Sefton and with Living Well Sefton partners, mentors, and neighbourhood partners.



Job Description

Advice Giving

1. Provide supportive and empathetic client interactions to help them articulate their issues and guide them in prioritising their needs.
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 representing 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, 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 Citizens Advice service.



Person specification

Person Specification	
1	Proven experience in providing welfare benefits advice, money advice, and budgeting support
2	Experience in supporting clients with multi-faceted issues.
3	Excellent communication skills, with the ability to engage confidently with clients face-to-face or over the phone
4	Strong interpersonal skills, including the ability to relate to and work with a diverse range of people and organisations
5	Good understanding of equality and diversity issues and policies
6	Proficiency in IT applications and case management systems
7	Commitment to continuous professional development
8	Ability to prioritize workload, meet deadlines, and work flexibly
9	Understanding and commitment to the aims and principles of the Citizens Advice service
10	Understanding of working with clients with complex needs

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 £26,335

Hours 35 per week (negotiable)

Contract type: Fixed term until March 2025

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

Location: Sefton (Office Based).

Office hours: 9 – 5pm

Pension: 7% (If you pay at least 1% salary contribution into the stakeholder scheme we will top this up to the required 8%)

What we offer to our staff

- Contribution of 7% of salary into a Stakeholder Pension.
- Professional and advice sector recognized training.
- Cycle to work scheme.
- Free VDU eye care test.
- Employee Assistance Programme.

For an application pack go to [Application form](#) 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: 26th July 12pm**
Interviews: Friday 2nd August