



Money Adviser x2 roles: Caseworker and Trainee

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 team work 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 and financial resilience.

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.



Terms and conditions

Salary £24,556 (Trainee position) £27,301 (Caseworker)

Hours: 35 (hours are negotiable)

Contract type: Permanent

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

Location: Sefton, Merseyside

Office hours: 9am – 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

- A contribution of 7% of your salary into a Stakeholder Pension
- Consideration for Hybrid working options
- Professional and advice sector recognised training
- Cycle to work scheme.
- Free VDU eye care test
- Employee Assistance Programme

Application is via online application form – www.seftoncab.org.uk/jobs/ or email recruitment@seftoncab.org.uk or telephone 0151 282 5650 for paper copies.

Please note: **Closing date for applications: Friday 16th August 12:00pm**

In-person or online interviews to be held on: **20th August 2024.**

Job Description



The role

This role offers the unique opportunity to make a tangible difference in the lives of individuals facing financial challenges, providing them with the guidance, support, and tools they need to navigate complex debt issues.

While this position is for a Money Advice Caseworker, we are open to trainees. If you're keen to embark on this rewarding career path but do not currently hold a certificate in money advice or equivalent, we encourage you to apply. We offer a supportive training program designed to prepare you for all aspects of this role, ensuring you have the knowledge and skills to succeed.

As a Money Advice Caseworker with our team, your role is pivotal in guiding clients to financial stability through comprehensive debt advice. Your responsibilities will span from direct client support—negotiating with creditors, ensuring benefits are maximized, and preparing legal documentation—to collaborating with our dedicated team to maintain the highest standards of service. You will strive for excellence by meeting personal and team targets, adhering to quality standards, and contributing to our collective success.

Empowering clients to understand and manage their financial situations is key, as is working with partner agencies and organisations to broaden access to our services and ensure holistic support. Your involvement will also extend to advocating for change based on client experiences and actively participating in the evolution of our services to meet emerging needs. Through your efforts, you will not only assist individuals in immediate need but also contribute to broader systemic improvements, enhancing our money advice services for the future.

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, health settings and community venues as required.



Job Description

Advice giving

- 1 Interview clients using sensitive listening and questioning skills in order 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

Required	
1	Experience and knowledge in debt casework, including advice on priority, non-priority debts, and insolvency solutions. Ability to advise in debt and other social welfare issues
2	Proven ability to meet performance and quality standards.
3	Commitment to ongoing training for MaPS Caseworker accreditation and adherence to Citizens Advice quality benchmarks.
4	Excellent communication skills, both verbal and written.
5	Experience of explaining complex information to clients and checking accuracy of calculations.
6	Competent in numeracy as needed for job tasks.
7	Systematic in casework with a readiness to follow and improve established procedures.
8	Proficient in IT, including Microsoft Office, for advice provision and document preparation.
9	Open to giving and receiving feedback constructively and ready to challenge when necessary.
10	Team player with a cooperative approach.
11	Dedication to the values and principles of Citizens Advice, including its commitment to equality and diversity.
Desirable	
12	Holds a Certificate in Money Advice Practice from the Institute of Money Advisers or an equivalent MaPS Caseworker accreditation.

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.