



Trainee Money Advice Caseworker

Job pack

Thanks for your interest in working at North and West Gloucestershire Citizens Advice. 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 values
- 3 things you should know about us
- Overview of Citizens Advice and North and West Gloucestershire Citizens Advice
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Clare Knapman by emailing norman.gardner@gloscab.org.uk or calling 01452 527202 ext 2033



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 North and West Gloucestershire Citizens Advice works

North and West Gloucestershire Citizens Advice provides advice services to 13,000 people each year with 28,000 issues. We deliver services to the residents of Gloucester, Tewkesbury, Forest of Dean and Cheltenham. We provide the services with the help of 80 volunteers and 26 staff who provide advice face to face in a number of locations, as well as by email and telephone. Due to Covid, our services are provided by telephone and email and staff are currently based remotely.

Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

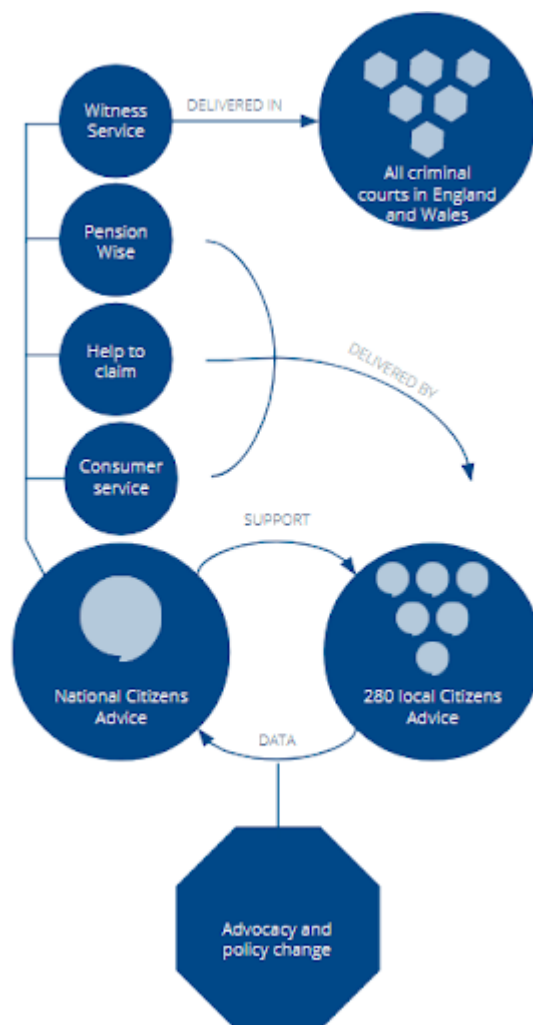
This role sits our network of independent charities, delivering services from

- 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

This role is to support those people who, often through no fault of their own, are in debt and /or do not have financial capability skills. You will work within a skilled team of people dedicated to help others, many of whom are vulnerable and in distress. This is initially a 12 months contract with review at 31st March 2021.



Role profile

Job description:

- Undertake on line and face to face training suitable to attain the skills to provide casework covering the full range of money and debt 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, challenging adverse decisions as appropriate; applying for charitable grants to support clients if appropriate.
- Provide on-going face to face and/ or telephone financial capability support to clients
- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Ensure that all casework conforms to the requirements of the Money Advice and Pensions Service, Citizens Advice Quality standard and to all internal systems and procedures.
- Assist with social policy work by providing information about clients' circumstances.
- 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.
- Make home/outreach visits as necessary

- Where required, provide statistical information on the number of clients and nature of cases and the provision of regular reports to management.
- Keep up to date with legislation, case law, policies and procedures relating to Money and Financial inclusion and undertake appropriate ongoing training to maintain appropriate CPD

Person specification

1. Effective communication skills (oral and written) with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
2. Ordered approach to work and an ability and willingness to follow and develop agreed procedures.
3. Experience and understanding of all aspects of the benefits system.
4. Understand the issues involved in interviewing clients and the difficulties which some clients face in accessing advice.
5. Ability to prioritise own work, meet deadlines and manage load whilst monitoring and maintaining own standards
6. Ability to use IT in the provision of advice and the preparation of reports and submissions.
7. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
8. Ability and willingness to work as part of a team.
9. Demonstrate understanding of social policy and their implications for clients and service provision.
10. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equality and diversity policies.



Terms and conditions

The FTE salary for the role is £22,425. The post is 2 days per week for 12 months (subject to review on 31st March 2021), and benefits from 25 days annual leave (pro rata).