



## Job description

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| Job title:     | Money Adviser  |
| Reporting to:  | Team Leader- Money Advice and Financial Education Unit               |
| Base:          | Southport<br>(You may be expected to work in other venues in Sefton) |
| Salary:        | £23,398 - £24,424  |
| Pension:       | 7 % Contribution.  |
| Hours of work: | 35 hours   |

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### Context of role:

Citizens Advice Sefton is a district wide service with staff and volunteers working across several sites and outreaches offering information and advice from generalist to specialist level across a range of social welfare enquiry areas.

Money advisers are required to have recent and in depth knowledge of money advice casework. If the post holder is not an accredited money adviser and an approved Debt Relief Order Intermediary then they will be expected to undertake training to become qualified. Money advisers may also be expected to deliver personal budgeting support to clients who are making the transition to universal credit.

The post holder will work directly with clients seeking advice but will also have the ability to support volunteers and trainees seeking to further develop advice skills.

## **Key work areas and tasks:**

### **Casework**

- Provide casework covering the full range of 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.
- Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate; this includes the applications for debt relief orders.
- 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.
- Make home/outreach visits as necessary.
- Provide advice and assistance to other staff across the whole range of money advice issues.
- Ensure that all casework conforms to the bureau's quality systems.
- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring, and report preparation.
- Ensure that all work conforms to the bureau's systems and procedures.

### **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 bureau management.
- Monitor service provision to ensure that it reaches the widest possible client group.
- Alert other staff to local and national issues.

### **Professional development**

- Keep up to date with legislation, case law, policies and procedures relating to money advice and undertake appropriate training.
- Read relevant publications and subscriptions
- 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.

### **Administration**

- Use IT for statistical recording, record keeping and document production.
- Keep up to date with policies and procedures relevant to bureau work and undertake appropriate training.
- Attend internal and external meetings as agreed with the manager.
- Maintain close liaison with relevant external agencies.
- Maintain a library of reference material and case law.

## **Public relations**

- Liaise with statutory and non-statutory organisations and represent the Service on outside bodies 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 CAB service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

## Person specification

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|----------------------|--|---|
| Experience           | 1<br><br>2<br><br>3<br><br>4<br><br>5  | <p>In depth knowledge and recent experience of money advice casework including budgeting support.</p> <p>Ability and willingness to work as part of a team and adapt to more than one target or contract.</p> <p>Ordered approach to casework and an ability and willingness to follow and develop agreed procedures and quality standards</p> <p>A good understanding of the issues involved in interviewing and working with clients, and in particular vulnerable people.</p> <p>A good understanding of social trends and their implications for clients and service provision.</p> |
| Skills and Knowledge | 6<br><br>7<br><br>8<br><br>9<br><br>10 | <p>Hold the certificate in Money Advice Practice or willing to obtain this accreditation.</p> <p>Good understanding of welfare benefits and in particular universal credit.</p> <p>A registered debt intermediary for debt relief orders (or willing to obtain accreditation)</p> <p>Good verbal and written communication skills with the ability to effectively advocate on behalf of clients</p> <p>Understanding and willingness to commit to the aims and principles of the Citizens Advice service and its equality and diversity policies.</p>                                   |
| Other                | 11<br><br>12                           | <p>Ability to work flexibly and prioritise diverse workload and willingness to travel to outreaches and offices within Sefton</p> <p>Commitment to continuing professional development</p>  |