



## **Money Advice Adviser (Trainee option available)**

### Job pack

Thanks for your interest in working at Citizens Advice Hart. 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 Citizens Advice Hart
- 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 Louisa Crowsley by emailing [servicemanager@citizensadvicehart.org.uk](mailto:servicemanager@citizensadvicehart.org.uk)



## 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 offer direct support to people in around 200 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.

## About Citizens Advice Hart

Citizens Advice Hart is an independent charity and a member of the national [Citizens Advice network](#).

Citizens Advice Hart provides a free, independent impartial and confidential advice service to around 3,000 people each year. We help our clients find a way forward with a range of problems including accessing benefits, managing debt, resolving employment, consumer, family relationship and housing issues. We operate from an office in Fleet (North East Hampshire), remotely and at outreach locations across Hart District local authority.

Our service is run by around 40 volunteers and several part time staff. Our advice facing roles operate across different channels such as face to face appointments, webchat, email and telephone as this makes our service far more accessible to our clients.

We run several projects including a service to support armed forces families, for those affected by cancer, to help those facing debt and at risk of eviction, those facing difficulty with fuel debt and those applying for benefits. We are ambitious to develop new services to support the more vulnerable members of our district.



### The role

As Money Advice Adviser you will provide advice and support to those at risk of homelessness caused by rent or mortgage arrears and other debt. You will need to explore all the options and solutions available to clients such as debt management plans, independent voluntary arrangements, bankruptcy, debt relief orders and other schemes. You will need to support clients through enforcement action and to negotiate with creditors to agree a settlement and positive outcomes for the client.



### Role profile

- Provide the full range of debt advice.

- Explore the client's financial situation and create a realistic and sustainable budget.
- Ensure income maximisation through the take up of appropriate benefits and other sources.
- Advise the client as to their options and negotiate with third parties as appropriate.
- Assist the client implement their preferred debt solution.
- 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.
- Provide advice and assistance to other staff and volunteers across the whole range of debt and money advice issues.
- Ensure that all casework meets the quality standards required by the FCA, Citizens Advice and Advice Quality Standard and abides by internal policies.
- Maintain case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation.
- Ensure that all work conforms to the internal systems and procedures.
- Liaise with the service funder as required ensuring it is kept up to date about the service, its outputs and challenges.



### **Person specification**

- Qualifications and proven experience of working in housing or managing debt.
- Good communication and numeracy skills with particular emphasis on negotiating and representing.
- Effective listening and questioning skills
- Effective writing skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
- Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
- Ability to prioritise own work, meet deadlines and manage caseload.
- Ability to use IT in the provision of advice and the preparation of reports and submissions.
- Ability to give and receive feedback objectively and sensitively and a

willingness to challenge constructively.

- Ability and willingness to work as part of a team.
- Commitment to professional development and learning

It is not essential you have worked within the Citizens Advice network but that you show potential to undertake the necessary learning pathway and to gain competency required of our advisers. In accordance with Citizens Advice national policy, we may require the successful candidate to be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.



## **Terms and conditions**

The terms are:

- This is a Fixed Term Contract for 12 months with potential for extension
- Hours 22.5 - 30 hours a week (hours negotiable)
- Pay – Annual FTE £24,000 (pro-rata £14,400 for 22.5 hours **or** £19,200 for 30 hours)
- Trainee option annual FTE £22,000 (pro-rata £13,200 for 22.5 hours **or** £17,600 for 30 hours) moving to £24,000 when qualified

Our standard terms and conditions include

- 37.5 hours is a FTE working week 0900-1700 with 30 minute break
- 25 days holiday plus bank holidays (holiday year runs January – December)
- 5% employer pension contribution to People's Pension personal pension scheme- with 3% minimum employee contribution



## **What we give our staff**

One of our key strategic objectives is to 'Make Us a Great Place to Work and Volunteer'.

We provide an Employee Assistance Programme for all paid staff including a confidential help line, counselling and other benefits.

We prioritise learning and development to both fulfil individual potential and to meet our strategic plan objectives. We also foster a supportive team approach reflected in our behaviours to each other including well-being and dignity at work.

Our Trustee board ensures that our workplace is a healthy and safe one and reviews policies to ensure they are fit for purpose and available to all.

We conduct an annual people survey which gives us feedback about how we can improve our support to those who work and volunteer for us and we hold regular team meetings to improve communication and teamwork.