



Money Advice Caseworker

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:

- The role profile and personal specification
- Terms and conditions
- What we give our staff
- Overview of Citizens Advice and Citizens Advice Hart

Want to chat about this role?

If you want to chat about the role further, you can contact us by emailing people@citizensadvicehart.org.uk



The role

As Money Advice Caseworker you will provide advice and support to those struggling with debts or at risk of homelessness caused by rent or mortgage arrears. 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 clients as to their options and negotiate with third parties as appropriate.
- Assist clients to 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 and FCA Consumer Duty, 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:

- Permanent
- Hours 22.5 - 30 hours a week (hours negotiable)
- Fleet office based
- Pay – Annual FTE £27,500 - £29,500 depending on experience

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

We provide

- IT equipment and reasonable adjustments
- Free parking

- Tea, coffee and biscuits
- Social events
- A warm and friendly team



What we give our staff

We prioritise learning and development to both fulfil individual potential and to meet our strategic plan objectives. We also nurture 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 enhance communication and teamwork.



Citizens Advice Hart Aims

Vision:

Finding a Way Forward

Statement of Purpose:

To ensure that all individuals within our community are heard and understood, whatever challenges they are facing, guiding them with care to confidently find a way forward.

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 4,000 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.

Our service is run by around 40 volunteers and 16 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 and services including supporting people leaving hospital - Home & Well, Advice First Aid to upskill community staff and volunteers, Foodbank, Outreach, Financial Resilience and Digital Exclusion. We are forward thinking and ambitious to develop new services to support the people who need us most.