



JOB DESCRIPTION

Job Title: Debt & Money Adviser

Hours: 37 hours per week

Annual Salary: £26,238 (depending on experience)

Annual leave: 32 days plus public holidays (pro-rata)

Responsible to: Project Manager

Funded by: Barnsley MBC

JOB PURPOSE

To work with Barnsley taxpayers and staff of the Income and Collection Team at Barnsley MBC. The aim is to work together, in joint co-operation, in the supportive recovery of Council Tax through the operation of a suitable agreement for payment of Council Tax.

TASKS & RESPONSIBILITIES

1. Advice work

1.1 to deliver advice through channels including; telephone, face to face, email, video and where appropriate home visits.

1.2 to ensure income maximisation by undertaking benefit checks and supporting the referred taxpayers with the take up of welfare benefits.

1.3 to provide debt advice (at general advice level) and act for the client where necessary i.e. draft letters, prepare financial statements and negotiate with third parties.

1.4 to assist referred taxpayers with other related problems, such as, benefit or housing issues and refer to other advisers or specialist agencies as appropriate.

1.5 to provide one to one support and advice on budgeting and money management.

1.6 to remain a point of contact for referred taxpayers during the advice process.

1.7 to maintain case records for the purpose of continuity of advice, information retrieval, statistical monitoring, and report preparation.

1.8 to prepare reports for the line manager, Trustee Board and BMBC as required.

1.9 to attend daily and weekly online or face to face meetings.

2. Social Policy

2.1 to provide statistical information and evidence from client work that will highlight issues of collective social policy concern at a local and national level.

2.2 to raise awareness about relevant social policy issues among office staff and representatives from BMBC.

3. Professional Development

3.1 to keep up to date with legislation, case law, policies and procedures relating to money advice and Council Tax recovery and to attend appropriate training.

3.2 to read relevant publications.

3.3 to attend relevant internal and external meetings as agreed with the line manager.

3.5 to assist in initiatives to improve services and client journey.

4. Administration

4.1 to maintain accurate and up to date case and file records using our Casebook electronic recording system.

4.2 to use the IT systems to produce regular progress reports, PowerPoint presentations, documents and correspondence.

4.3 to maintain relevant reference material and local information systems.

4.4 to ensure that all work conforms to the office administrative policies and procedures and meets our quality standards.

5. Other duties and responsibilities

5.1 to maintain client confidentiality in line with Citizens Advice policies and procedures

5.2 to uphold the aims and principles of the Citizens Advice service and its equal opportunities/equity diversity and inclusion policies.

5.3 to maintain and develop a close liaison with relevant external agencies and represent the Citizens Advice service as appropriate.

5.4 to abide by health and safety policies and procedures and share responsibility for own safety and that of colleagues.

5.5 to carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.

PERSON SPECIFICATION

Essential requirements:

1. A minimum of one year's recent experience in delivering money /debt and general advice to members of the public.
2. Skills, knowledge and recent experience of carrying out income maximisation checks.
3. Experience of providing generalist advice or working in a general advice setting.
4. The ability to communicate effectively and sensitively.
5. Good writing skills with the ability to draft correspondence and reports.
6. Good numeracy skills with the ability to carry out efficient calculations and work with clients in the preparation of budgeting sheets.
7. An ordered approach to work and the ability to prioritise tasks, to identify and work to deadlines and to manage time effectively under own initiative.
8. Good networking and liaison skills and ability to establish and develop effective working relationships with partners and other stakeholders.
9. An understanding of the need for confidentiality and a non-judgmental approach to advice provision.
10. The ability to work effectively as part of a team and contribute to a wider team structure.
11. The ability to use standard IT packages in the provision of advice, produce correspondence and the preparation of statistical reports and submissions.
12. The ability to work from home in a confidential area.
13. Demonstrate an understanding of the role of social policy work in bringing about change.
14. An understanding and commitment to work within the Aims and Principles of the Citizens Advice service and its equity, diversity and inclusion policies.
15. Agreement to undertake enhanced DBS check, if required.

Desirable requirements:

1. Competence in use of the Citizens Advice electronic case management system - Casebook.
2. Competence in use of Quick Benefit Calculator software.