

## **JOB DESCRIPTION**

<b>JOB TITLE:</b>	<b>Debt and Money Management Adviser</b>
<b>CONTRACT:</b>	<b>2 year fixed term</b>
<b>HOURS:</b>	<b>37 hours per week</b>
<b>SALARY:</b>	<b>£27,574 per annum (depending on experience)</b>
<b>ANNUAL LEAVE:</b>	<b>32 days holiday plus public bank holidays</b>
<b>RESPONSIBLE TO:</b>	<b>Project Manager</b>
<b>DBS CHECK:</b>	<b>Enhanced required</b>
<b>Post funded by:</b>	<b>National Lottery Reaching Communities Fund Yorkshire and Humber Region.</b>

## **PURPOSE OF THE ROLE**

- the main aim is to provide advice that will improve access to specialist debt advice to specifically support vulnerable people in Barnsley who are struggling to cope as a result of a significant crisis or major change in circumstance.
- to deliver debt advice through all channels including; face to face, telephone, digital, by video link and where necessary home visits.
- maintain case records for the purposes of continuity of casework, information retrieval, statistical monitoring and report preparation.
- ensure all casework conforms to Citizens Advice performance quality framework.

## **KEY RESPONSIBILITIES**

- develop a referral pathway utilising a combination of a new online referral portal and direct dial telephone so that selected partner organisations can easily refer their most vulnerable clients for one-to-one support.

- deliver debt advice through all channels including; face to face, telephone, digital, video link and where appropriate home visits.
- prepare and present cases and applications to the appropriate statutory bodies, tribunals and courts as appropriate and negotiate with third parties where necessary
- negotiating with third parties/creditors and drafting or writing letters.
- ensure income maximisation through the take up of appropriate benefits, discretionary relief and grants.
- provide ongoing support to people with multiple, interlinked issues on all categories of law, including: benefits, employment, housing, relationships, consumer and energy issues.
- signpost and / or make effective referrals to other agencies as appropriate.
- ensure details of all clients records are accurate and kept in an orderly manner and that confidentiality is maintained at all times.
- ensure that all clients' records are entered onto our electronic case management system.
- assist with Citizens Advice research and campaigns work by assisting with surveys and providing information about client's circumstances, statistical information and nature of cases.
- keep up to date with legislation, policies and procedures and attend training as appropriate.
- liaise with other statutory and voluntary bodies to maintain effective working relationships and effective referrals.
- maintain any monitoring statistics required by the funder and Citizens Advice Barnsley and provide regular reports as may be required.
- help, plan and participate in evaluation of the project.
- attend appropriate internal and external meetings as agreed with the Line Manager.
- keep up to date with legislation, case law, policies and procedures relating to money advice, and attend appropriate training.
- read relevant publications.
- prepare for and attend supervision sessions.

- work within Citizens Advice policies and procedures and uphold the Aims and Principles of the Citizens Advice Service at all times.
- carry out all duties in accordance with relevant health and safety legislative requirements, adopting safe working practices in all workplaces.
- undertake all other duties and responsibilities as agreed from time to time commensurating with the grade and nature of the post.

## **PERSON SPECIFICATION**

### **Debt and Money Management Adviser**

#### **ESSENTIAL**

1. At least 2 years of recent experience in delivering debt advice, however, extensive training available for those that do not meet this specification.
2. Up to date competencies in the debt advice process.
3. Ability to communicate effectively and sensitively, both verbally and in writing, with a wide range of individuals.
4. Awareness of the social policy issues affecting clients.
5. Excellent problem solving skills.
6. Experience of working on your own initiative and ability to work without close supervision.
7. Numerate and computer literate with experience in using Google Docs, Google Meet, Google Sheets etc
8. An ability to use bespoke IT software in the provision of advice via an electronic case management system, case recording and the preparation of statistical/monitoring reports.
9. Good time management skills and ability to prioritise tasks and work to deadlines.

10. Ability to establish and maintain good working relationships with external and partner referral agencies.
11. Ability to summarise information, record it accurately and concisely and maintain effective administrative systems.
12. Understanding of the need for confidentiality and non-judgemental approach to advice provision.
13. An understanding and commitment to work within the Aims and Principles of the Citizens Advice Service.
14. Ability to travel effectively between different locations at various times during the day when required.
15. Ability to meet enhanced DBS disclosure requirements.

#### **DESIRABLE**

1. Experience of using Citizens Advice case recording system
2. Competence in use of benefit calculation software.