

# Money Advice Caseworker

## Job pack

Thanks for your interest in working at North Yorkshire Citizens Advice & Law Centre. This job pack should give you everything you need to know to apply for this role and what it means to work for us.

In this pack you'll find:

- An overview of North Yorkshire Citizens Advice & Law Centre
- An overview of the role
- The job description
- The person specification
- What we give our staff

### Want to chat about this role?

If you want to chat about the role further, you can contact Gillian Grimes (Director of Operations) by emailing [gillian.g@northyorksca.org.uk](mailto:gillian.g@northyorksca.org.uk) or calling 01653 695542



# Overview of North Yorkshire Citizens Advice & Law Centre

We provide free, confidential and impartial information and advice on a range of issues including money, benefits, housing and employment, and campaign on big issues affecting people's lives. Our goal is to help everyone find a way forward, whatever problem they face.

We're an independent charity and part of the Citizens Advice and Law Centre networks across England and Wales. Our main offices are located in the heart of our communities in Harrogate, Malton, Northallerton, Richmond, Scarborough, Selby, Skipton and Whitby. We also have a number of outreach locations that we deliver advice from across North Yorkshire and #WeComeToYou in our Advice Bus and Advice Van.

Often, people are in crisis by the time they reach out to us, unable to see a way out of the situation they find themselves in. Our experienced advisers and highly skilled volunteers provide personalised advice to tackle their immediate problem while also addressing any underlying and overlapping issues.

We give advice face to face, over the phone, and via web chat and email. We help around 25,000 people a year on all types of issues. Our Law Centre provides specialist legal advice on housing, immigration, employment and family matters.

As an independent charity, we raise all our own money, and each of our offices has its own identity within the local community.



## The role

The Money Advice Caseworker will play a key role in our advice team, providing high-quality debt advice and client support while achieving project targets and deadlines. Combining technical expertise with a client-focused approach, this role involves helping individuals resolve financial difficulties and maximise their income through benefit take-up. A commitment to delivering impactful and compassionate advice is essential.



## Job description

### Casework

- Provide advice and 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 including through the take up of appropriate benefits
- Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate
- 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 issues
- Ensure that all casework conforms to the Office Manual, the Advice Quality Standard and the Specialist Quality Mark as appropriate
- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
- Keep up to date with legislation, case law, policies and procedures relating to money advice and undertake appropriate training as per funder requirements
- Attend relevant internal and external meetings as agreed with the line manager

## Research and Campaigns

- Assist with research and campaigns work by providing information as appropriate
- Alert clients to research and campaign options
- Keep up to date with legislation, policies and procedures and undertake appropriate training

## Other

- Carry out any task that may be within the scope of the post to ensure the effective delivery and development of the service



## Person specification

1. Trained in money advice (Money and Pensions Service (MaPS) Accredited Debt Learning Plan or equivalent) or willing to undertake this role as a trainee and complete the necessary training
2. Be able to commit to, and work within, the aims, principles and policies of the Citizens Advice service
3. Effective oral and written communication skills with particular emphasis on negotiating, representing and preparing correspondence
4. Have excellent interpersonal skills and the ability to interview clients using sensitive listening and questioning skills to get to the root of issues and empower clients, whilst maintaining structure and control of meetings
5. Demonstrate an ordered approach to casework and an ability and willingness to follow and develop agreed procedures
6. Ability to systematically manage a varied workload, prioritise and meet deadlines under pressure
7. Ability to use IT systems and electronic resources in the provision of advice, administrative support and in the preparation of reports
8. Ability and willingness to work as part of a team, give and receive feedback objectively and to support volunteers
9. Demonstrate an understanding of the issues affecting society and the implications of these on the client and the service
10. Have an understanding of equality and diversity and its application to the provision of advice



## What we give our staff

- Workplace pension scheme
- Healthy work/life balance with a 37 hour working week and flexible approach to working arrangements
- Generous annual leave of 5.6 weeks holiday and an additional 4 days at Christmas plus all public bank holidays
- Commitment to health and wellbeing – access to employee assistance programme, discounts on shopping and dining, lifestyle and entertainment
- Work related travel above mileage to designated office paid at 45p per mile
- Commitment to ongoing development – regular training workshops and personal development opportunities

**In accordance with Citizens Advice national policy we will need the successful candidate to be screened by the DBS (Standard check). However, a criminal record will not necessarily exclude you from being able to take up the job.**

**We are a disability confident employer and welcome candidates who will be using access to work.**