

# Trainee 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 Lizzie Baker (Project Manager) by emailing [lizzie@northyorkslca.org.uk](mailto:lizzie@northyorkslca.org.uk) or calling 01748 823862



# 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 Trainee Money Advice Caseworker will play a key role in our advice team, undertaking accredited training to provide high-quality, client-focused money advice and support. You will help individuals resolve financial difficulties and maximise their income through measures such as claiming benefits, negotiating with third parties, and assisting with related problems. This role requires the ability to work independently while seeking support when needed, manage a varied workload with attention to detail, and meet project targets and deadlines. A commitment to delivering compassionate, impactful advice in line with the principles of Citizens Advice - free, confidential, impartial, and independent - is essential.



## Job description

**As a trainee you will be working towards being proficient in the following areas:**

### Casework

- Provide advice and casework across a full range of money issues including debt solutions, budgeting support and the cost of living in order to support clients to improve their financial wellbeing
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning
- Negotiate with third parties, including creditors, as appropriate
- Ensure income maximisation including through claiming 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 money and debt issues
- Ensure that all casework conforms to the Office Manual and the Advice

Quality Standard 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

### **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. Able to study independently while proactively seeking support when needed, and to complete accredited training successfully
2. Able to work with clients and third parties face to face, by phone and by email, and to be based in one of the following North Yorkshire locations: Richmond, Northallerton, Selby or Malton (with travel to Scarborough when required), or in Scarborough (with travel to Malton when required)
3. Committed to and able to work within the aims, principles and policies of Citizens Advice, including delivering services that are free, confidential, impartial, and independent
4. Effective oral and written communication skills with particular emphasis on negotiating, representing and preparing correspondence
5. 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

6. Demonstrate an ordered approach to casework, and an ability and willingness to meet quality requirements when working in an environment regulated by the Financial Conduct Authority (FCA)
7. Ability to systematically manage a varied workload, prioritise and meet deadlines
8. Ability to use IT systems and electronic resources accurately and with attention to detail in providing advice and carrying out associated administration
9. Ability and willingness to work as part of a team, give and receive feedback objectively and to support volunteers
10. Demonstrate an understanding of the issues affecting society and the implications of these on the client and the service
11. 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.**