

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 Charlotte Wild by emailing charlotte@northyorkslca.org.uk or calling 01757 701320 extension 1030



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 use their knowledge and experience to provide high-quality, client-focused money advice and casework, helping people resolve financial difficulties and improve their financial wellbeing. You will support clients across a range of money issues, including debt, budgeting, income maximisation and benefit entitlement, negotiating with third parties where appropriate and representing clients where necessary. The role requires the ability to manage a varied caseload independently, exercise sound judgement, and consistently meet quality standards and project targets. A commitment to delivering compassionate, impactful advice in line with the principles of Citizens Advice – free, confidential, impartial and independent – is essential.



Job description

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
- Manage an allocated caseload independently, seeking guidance on complex or unusual cases where appropriate
- 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
- Maintain and develop knowledge of legislation, case law, policies and procedures relating to money advice, and undertake continuing professional development and any training required by funders or the organisation
- 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

Essential

1. Trained in money advice (for example, through the Money and Pensions Service (MaPS) Accredited Debt Learning Plan or an equivalent recognised money advice qualification), with recent experience of managing a money advice caseload
2. Knowledge of debt remedies, insolvency options and the interaction between debt and welfare benefits
3. Able to work effectively with clients and third parties by telephone and email, and face to face where the role requires
4. 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
5. Effective oral and written communication skills with particular emphasis on negotiating, representing and preparing correspondence

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

Desirable

12. Experience of working within Citizens Advice
13. Able to work one or two days per week in one of our North Yorkshire offices: Harrogate, Malton, Northallerton, Richmond, Scarborough or Selby.



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 55p per mile

- Commitment to ongoing development – regular training workshops and personal development opportunities

In accordance with Citizens Advice national policy we may need the successful candidate to be screened by the DBS. 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.