



## **Citizens Advice Liverpool JOB DESCRIPTION**

### **Purpose of role:**

To excel against targets in the direct provision of an effective supported Money Advice casework service that is compliant against quality standards including the MAS quality of advice framework. To ensure that clients receive their full entitlement to all benefits, receive appropriate financial capability support and experience a positive customer experience from Citizens Advice Liverpool.

To also contribute to initiatives to improve service delivery and provision for our clients.

To be successful in this role, you will need to be confident, motivated and willing to try new things, have excellent communication skills with an ability to work under pressure to achieve targets and outcomes with minimum supervision.

**We're not looking for the finished article, if you have the right attitude then we can help to develop your skills.**

**Closing date and time: 27<sup>th</sup> November 2019**

**Interview date: 3<sup>rd</sup> or 5<sup>th</sup> December 2019**

## **Money Advice Caseworker**

### **Citizens Advice Liverpool**

#### **Main duties and responsibilities**

##### **Casework**

- Provide casework covering the full range of debt advice.
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning creditors
- Negotiate with third parties as appropriate.
- Ensure income maximisation through the take up of appropriate benefits.
- Prepare and present cases to the appropriate statutory bodies 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 across a range of debt issues.
- Ensure that all casework conforms to the Financial Conduct Authority and Debt Advice Quality Framework in relation to own casework.
- To work with and where necessary support volunteers that maybe working as part of the money advice team.
- Deliver consistent performance against funder or service targets/outcomes.
- Maintain accurate case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Ensure that all work conforms to the CALs systems and procedures.
- To actively empower and support clients where appropriate so that they are able to deal with their problem in the future.
- To collect and record all relevant information given onto the Case Management Software(CMS) - CASEBOOK using MART to meet the monitoring and evaluation requirements of the Money Advice Service.
- To use the CMS -CASEBOOK to identify whether a client has an existing or repeat enquiry in order to minimise duplication of advice resources.

##### **Performance targets and quality standards**

- To meet the individual performance targets set for debt caseworkers (daily, weekly, monthly and annually) and ensure that the advice given meets the quality standards of:
  - the AQS general help level quality standard
  - the Citizens Advice quality assurance scheme
  - the Money Advice Service quality framework.

- To inform the Line Manager where performance targets are at risk of not being met and any reasons for under-performance.
- Provide regular reports and feedback to the Line Manager as required.
- Identify solutions to resolve any under-performance on targets and engage positively in discussions with the line-manager to achieve the required levels.
- To contribute to the Annual Report and newsletter.

### **Working in Partnership**

- To work in collaboratively with partner agencies, local authority and other local statutory and voluntary organisations in order to increase access to the service and to the range of support and advice needed according to individual circumstances.
- To make appropriate referrals in-line with documented procedures: to key partner agencies, for example National Debt Line/Step-Change who may be better placed to provide debt management and other valid solutions for clients or to other advisers or specialist agencies as appropriate where there are other related problems such as employment and consumer etc.

### **Social policy and monitoring**

- Assist with social policy work by providing information about clients' circumstances through the appropriate channel.
- Liaise with statutory and non-statutory organisations and represent the Service to outside bodies as appropriate.

### **Administration**

- Maintain and monitor effective and efficient administrative systems.
- To be self-administrating and comply with existing practices, policies and procedures.

### **Service development**

- To undertake recommendations from your line manager with regards to planning and developing the CAL debt service in order to meet specific contract requirements.
- To produce information, reports and materials relevant to effective money advice strategies as and when required.
- To assist with the promotion of the money advice service of CAL to the wider community.
- To work as part of the CAL money advice team and contribute to effective service provision.

### **Other duties and responsibilities**

- With the support of your line manager, Identify and address your training and development needs.
- Advise the line manager on staffing and service delivery and performance issues.

- You may on occasion and with prior arrangement provide cover for out of hours advice/telephone rota.
- Attend regular meetings of paid and unpaid staff.
- Carry out any other tasks which may be within the scope of the post to ensure the effective delivery and development of the service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Demonstrate a commitment to the aims, principles and policies of the CAB service and the implementation of its Equal Opportunities policies.

### **PERSON SPECIFICATION**

1. Have recent knowledge and experience of specialist debt casework.
2. Understanding of the issues involved in interviewing clients.
3. Ability to analyse and interpret complex information.
4. Effective oral and written communication skills.
5. Numerate to the level required by the tasks.
6. Ability to prioritise own work, meet deadlines, manage workload and targets in a pressured environment.
7. Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
8. Ability to use IT in the provision of advice and the preparation of reports and submissions.
9. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
10. Ability and willingness to work as part of a team.
11. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equalities and diversity policy
12. Ability and willingness to travel to and work from different sites within Liverpool.

#### Desirable

13. Experience of delivering debt advice through outreach locations.
14. Accredited by MAS (or another Competent Authority) as an Approved Intermediary for Debt Relief Order purposes OR proven recent experience to enable such accreditation

**\*If not already qualified, you will be expected to undergo training and obtain the qualifications as a priority.**