



**Gloucester,
Cheltenham
& Tewkesbury**

Money Advice Caseworker

Role purpose

This role as a Money Advice caseworker is to support clients with both personal and business debts. Working within the money advice team you will provide casework support to a range of clients, many with complex needs and in conjunction with both staff, volunteers and our partners, you will be working to achieve exceptional outcomes for our clients.

Context of role

Gloucester & District Citizens Advice Bureau have several contracts working to support clients from a variety of backgrounds. These contracts include the Money Advice Service, Healthy Homes contract funded by Gloucestershire CCG and the GLOMAS Business debt advice service supported by Gloucestershire County Council. The business debt advice service provided by Gloucester & District CAB is one of the few face to face services of this type. With a team of paid caseworkers and volunteers you will be working to support clients with both personal and business debts to achieve positive outcomes.

This role will include supporting volunteers who specialise in providing debt advice as well as managing a caseload of debt clients. This is a full time vacancy but part time appointments would be considered.

Casework

- Provide casework covering all aspects of debt advice.
- Undertake benefit checks and where appropriate support clients to maximise their income through benefit applications
- Undertake income maximisation including energy switching checks and applying for individual charitable grants where appropriate
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
- Negotiate with third parties as appropriate.
- 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.
- Make home/outreach visits as necessary.
- Ensure that all casework conforms to the bureau's Office Manual and the Advice Quality Standard and/or the Specialist Quality Mark as appropriate.
- Maintain case records for continuity of casework, information retrieval, statistical monitoring and report preparation.
- Work closely with the whole team, including volunteers, to deliver effective money advice.

Research and campaigns

- Assist with research and campaigns work by providing information about clients' circumstances.
- Provide statistical information on the number of clients and nature of cases and provide regular reports to bureau management for the purposes of reporting to funders.

Professional development

- Keep up to date with legislation, case law, policies and procedures relating to Welfare Benefits and Money Advice and undertake appropriate training.
- Attend relevant internal and external meetings as agreed with the line manager.
- Prepare for and attend supervision sessions/team meetings/management team meetings as appropriate.

Administration

- Maintain local information systems.
- Use IT for statistical recording, record keeping and document production.
- Keep up to date with policies and procedures relevant to bureau work and undertake appropriate training.
- Maintain close liaison with relevant external agencies.

Other duties and responsibilities

- Carry out any other tasks that may be reasonably considered within the scope of the post to ensure the effective delivery and development of the service.
- Demonstrate commitment to the aims and policies of the CAB service.

Person specification

- Knowledge and experience of Money Advice casework
- Debt Relief Order intermediary (desirable)
- Knowledge and experience of maximisation of income through benefit checks and applications to charitable trust
- Effective oral communication skills with emphasis on negotiating and representing.
- Effective writing skills with emphasis on negotiating, representing and preparing reviews, reports and correspondence.
- Ordered approach to casework including ability to prioritise own work, meet deadlines and an ability and willingness to follow agreed procedures.
- Ability to use IT in the provision of advice and the preparation of reports and submissions.
- Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
- Ability and willingness to work as part of a team.
- Ability to support volunteers in the provision of money advice
- Ability to monitor and maintain own standards.
- Demonstrate understanding of social trends and their implications for clients and service provision.
- Understanding of and commitment to the aims and principles of the CAB service and its equality and diversity policies.