

## **NORTH TYNESIDE CITIZENS ADVICE Job Description**

**Experienced Debt Caseworker  
within our Social Welfare Advice Team (SWAT) covering all debt projects.**

### **Trainee caseworker**

**You will be highly motivated without previous experience of delivering money advice but show a willingness and ability to learn and develop quickly.**

**Responsible to:** Money Advice Manager

**Accredited Caseworker salary:** £30,237.90 per annum

**Trainee Salary;** £27,302.26 per annum

Pay award pending.

**Hours:** 37 per week

**Role purpose:** To deliver good quality information, advice and casework to clients in debt, benefits and Housing (debt issue) with due regard to the aims, policies and procedures of the organisation and service, working within a client focussed and responsive team.

### **Key Areas of Responsibility**

1. To provide a high-quality debt, benefits and housing advice service to our clients over the telephone, webchat and email (full training will be provided)
2. Handle inbound calls from clients seeking help with their debts
3. Carry our casework for clients when necessary, including, advocating on behalf of clients recording accurate case notes on our internal case management system, negotiating with third parties, drafting letters to clients and third parties, completing budgets & financial statements.
4. Maintain client records to required standards on the organisation's management information system
5. Support clients in a professional manner and with sensitivity and confidentiality to their situation.
6. Maintain standards of service delivery and ensure that all advice work meets the appropriate standard required by the Money Advice & Pension Service quality framework, Citizens Advice Quality of Advice Audit, and the Financial Conduct Authority (FCA)
7. To be responsible for achieving the Key Performance Indicators (KPI's) set for this post.

8. Assist clients with budgeting and income maximisation including advice on entitlement to welfare benefits using Quick Benefit Check.
9. Signpost and give information to clients with other related problems where they are an integral part of the case and refer to other advisers or specialist agencies as appropriate.
10. Proactively manage a varied workload, ensuring deadlines are met, including taking ownership for monitoring own workload e.g., proactively reviewing progress on current cases and recording outcomes of completed cases.
11. Read relevant publications and electronic updates to maintain own knowledge keep up to date with legislation, case law, policies and procedures relating to Social Welfare Advice (Debt, Benefits and Housing).
12. Work flexibly within a team environment, respond positively to change and attend staff/team meetings as appropriate.
13. Develop and maintain Information Technology proficiency to support your work requirements
14. To work within the Aims, Principles and Policies of the Citizens Advice service.
15. To contribute to the Social Policy, work of the Citizens Advice North Tyneside and our National organisation.
16. To carry out the relevant administrative tasks necessary to progress your cases.

### **Contribute to the team**

1. Contribute to the efficient working of the team in delivering against the project delivery target requirements
2. Engage with team members, sharing knowledge and good practice and supporting each other to problem solve
3. Attend and participate in local team meetings, Money Advice Groups, project regional manager/adviser events and National Citizens Advice conferences as recommended by your line manager

### **Other Duties and Responsibilities**

1. Signpost clients to other providers as appropriate.
2. Make and take calls from professional agencies as required to establish circumstances.
3. Deal with incoming emails from clients and creditors.
4. Manage workflow via task list.
5. Identifying opportunities for the Service's development and undertaking forward planning so the Service can respond to local needs.

6. To abide by health and Safety guidelines and share the responsibility for their own safety and that of colleagues.
7. Any other reasonable administrative duties required ensuring the smooth running of Citizens Advice North Tyneside.

### **Performance Standards**

Performance standards will be continually assessed by the Money Advice Manager. You are responsible for meeting the performance standards set for this role. Any underperformance will be addressed and if appropriate, remedial support will be provided. If the required standard is still not achieved and failure to deliver continues, disciplinary action will be taken.

### **Equality and Diversity**

Ensure that work undertaken reflects and supports the service's Equality and Diversity Strategy

### **Working conditions**

1. The post-holder will report directly to the Money Advice Manager
2. Operate within an Equal Opportunities Policy.

### **Training**

This post will offer comprehensive training. You will be required to commit to and complete the Money Advice and Pension Service Accreditation training to Adviser level and work towards caseworker accreditation for the post during your probation period.

Attend and complete debt advice training to advice level followed by specialist training (to casework level).

Attend learning events and carry out learning activities in line with Continuing Professional Development requirements for debt advisers.

Keep up to date with legislation, case law, policies and procedures relating to money advice, and attend appropriate training, including reading relevant publications

To identify and develop your own learning opportunities

**The SWAT Trainee caseworker is a developmental role, and the post holder will be required to complete the relevant accredited debt advice training during your probation period of 6 months.**

## **PERSON SPECIFICATION**

### **Trainee Social Welfare Adviser & Social Welfare Adviser**

#### **ESSENTIAL**

1. An ability to demonstrate a high level of commitment to training and good understanding/experience of the processes in dealing with advice giving
2. An ability to understand and deal with complex information is essential

3. The successful applicant will have excellent organisational and time management skills.
4. The role involves managing a caseload, meeting targets and working to a high-quality standard.
5. The ability to prioritise tasks and work to deadlines using own initiative
6. At least 12 months experience of working in a customer service environment
7. The ability to communicate effectively, both orally and in writing with a range of people and organisations
8. Good numeracy skills with the ability to carry out efficient calculations and prepare budgets for clients
9. Ability to use IT for statistical recording, record keeping and document production
10. The ability to work effectively and collaboratively as part of a team and work without close supervision
11. Ability and willingness to follow agreed procedures
12. Ability to work in a sensitive, enabling and non-judgemental way with people from a wide range of backgrounds
13. Ability to maintain confidentiality and appropriate professional boundaries
14. Understanding of and commitment to the aims and principles of the Citizens Advice service.

### **DESIRABLE**

1. At least one years' experience in advice work or a customer service centre.
2. Experience of working with people with mental health issues, or people with disabilities.
3. The ability to identify Social Policy issues arising from advice work and an ability to analyse and report on those issues.

### **OTHER**

Participate in research & campaigns work, as organised within the organisation and at regional or national level by raising evidence forms, providing case studies etc

Comply with all the organisation's published policies and procedures, with attention to Health and Safety, Risk Management, Confidentiality, Home Working policies and Equal Opportunities. Uphold the aims and principles of the organisation Undertake any other duties as might be reasonably required within the scope of the role.

North Tyneside Citizens Advice is a Disability Confident and Living Wage employer.