

Money Advice Caseworker

Job pack

Thanks for your interest in working at Citizens Advice in West Sussex (North, South, East) (CAWS). This job pack should tell you everything you need to know to apply for this role and what it means to work at CAWS.

In this pack you’ll find:

* Our values
* 3 things you should know about us
* Information about the team, organisation and role
* The role profile and person specification
* The benefits of working at CAWS
* Our approach to equality and diversity
* Guidance on completing your application

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| **Want to chat about this role?**If you’d like to chat about the role, please contact Recruitment@Westsussexcab.org.uk |

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|  Our values – check our local values We’re inventive. We’re not afraid of trying new things and learning by getting things wrong. We question every idea to make it better and we change when things aren’t working.We’re generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.We’re responsible. We do what we say we’ll do and keep our promises. We remember that we work for a charity and use our resources effectively. |
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|  | 3 things you should know about us |

1. CAWS is a registered charity and is a member of the Citizens Advice service. CAWS has six main advice centres in Crawley, Horsham, Haywards Heath, Burgess Hill, East Grinstead, Shoreham-by-Sea and Worthing, as well as several other locations in the community.
2. We’re here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won’t turn people away.
3. We’re listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.
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 How Citizens Advice works

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| The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members, of which CAWS is one.CAWS is made up of:* 49 local staff working in one of our 6 offices.
* 270 volunteers

We deliver general advice on benefits, debt, housing, employment, immigration, consumer issues and more, as well as working on several projects, including:* Macmillan Welfare Rights, for people with cancer and their families
* MASDAP – Money Advice service
* Homelessness prevention projects
* Help to Claim- Universal Credit
* EU Settlement Scheme – Mid Sussex
* Crawley Connects, offering advice in migrant communities

The role you’re applying for is in the in the MASDAP service as a Money Advice Caseworker.  | Citizens Advice in West Sussex FINAL blue on white |

 Find out more

Here are 3 ways you can find out more about us

* Citizens Advice - for everyone, for 80 years
* [Beyond the job pack](https://youtu.be/oGmXhytXPQU): A short video with staff and volunteers describing what they love about CAWS

 The role

CAWS offers confidential advice online, over the phone, and in person, for free. Through our national network of charities, we give people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.

In 2018-19 we helped 34,320 people face to face, over the phone, by email and webchat, and people visited our online advice pages. We help with everything from money issues to problems at work, housing to consumer rights.

We’re looking to recruit an excellent Money Advice Supervisor who is part of overseeing the supportive and enabling debt advice process encouraging clients to Self-Help where appropriate. To support the supervision of the money advice team in raising quality of debt advice across the region ensuring compliance with performance targets and quality standards.

A flexible, multi-channelled, accessible, tailored, needs led service delivering accessible, client focused money advice and casework service via telephone, digital and face-to-face channels.

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Just as importantly, you’ll have a passion to support those in need and a keen problem solver which will make a key impact on delivering our service.

Our roles are open to discussion about flexible working, which may include arrangements such as part-time working, formalised flexitime, fixed (non-standard) working hours, working from home and job-sharing.

Flexible working - while our teams are office based, its fine to work from home regularly, and we welcome discussions about working part-time.

We particularly welcome applications from disabled and Black, Asian and Minority Ethnic (BAME) candidates as BAME and disabled people are currently under-represented throughout Citizens Advice. We are a member of the race equality campaign at Business in the Community, the Prince’s responsible business network and are committed to improving employment opportunities for ethnic minorities across the UK. We also welcome applications from, LGB and Trans and non-binary candidates.

We have made a positive commitment to employing disabled people and guarantee to interview all disabled candidates who meet the minimum essential criteria for the role as set out in role profiles.

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| Closing Date: | 9 am, 15th of September |
| Interview Date: | TBC |

**Please note, subject to the volume of applicants, applications may close early at the discretion of CAWS.**

 Role profile

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| Reporting to | Money Advice Caseworker |
| Proficient salary & contract term | £22-28,000 depending on experience, 1 year contract, awaiting confirmation likely to extend beyond.  |
| Location | Flexible within the different offices across West Sussex and opportunity to work from home |
| Team overview | The MASDAP team work with clients experiencing financial difficulties and tackling varying types of debt.  |
| Role overview | * To ensure the delivery of high quality money advice and casework across the spectrum of the debt process.
* To achieve the best appropriate outcomes for the people faced with debt issues.
* To provide locum support as needed to neighboring organisations.
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| Main responsibilities | Key elements/Tasks |  |
| To provide effective supervision and ensure quality standards are set and met | * To engage with clients via multiple channels including face to face, telephone, email and webchat to provide full holistic advice and casework
* Effectively manage own caseload following internal processes and meeting all necessary quality standards
* Collate evidence to produce financial statements and support casework and advice on options to resolve debts including reducing expenditure and increasing income and debt remedies so the client makes an informed choice
* Develop and negotiate sustainable repayments to creditors-including direct contact with creditors such as lenders or landlords as needed
* Advise the client on court proceedings for debt recovery and procedures for repossessions including applications the client can make to the court and provide casework support where appropriate
* Provide income maximisation support including benefit checks, benefit claims, budgeting advice and access to grants or other sources of help to address the money problems
* Completing clear and accurate records and use advice and money casework tools
* To take a holistic approach to assessing the clients needs, using signposting and referrals to ensure the client receives wider support as needed including mental health support.
* Assess and agree the appropriate level of service, taking into consideration the clients ability to take the next steps themselves, the complexity of the problem (and CAWS resources), undertaking casework to progress the case as needed.
* Respond to feedback and address any actions as identified for example via peer reviews or training
* Provide support to debt team and volunteers including trainees and undertake peer quality checks as needed
* To provide locum cover when needed internally and by agreement with neighboring organisations and following their procedures.
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| Professional Development | 1. Keep up to date with legislation, policies and procedures and best practice ensuring role competencies are met by undertaking appropriate training and informal learning
2. Use feedback to undertake continuous improvement to develop your skills and expand your knowledge.
3. Attend relevant internal and external meetings as agreed with the line manager
4. Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate.
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| Research and Campaigns | * Support our research and campaigns work through various channels including case studies, data collection, report writing, sharing your expertise and insight.
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| Other Duties & Responsibilities  | * Carry out any other tasks which may be within the scope of the role to ensure the effective delivery and development of the service.
* Support other digital channels and deliver on any digital advice contract or project at short notice
* Undertake our CORE training to Level 3 Advice to include debt advice at FCA compliance
* Demonstrate commitment to the aims and principles of the Citizens Advice service including equality and diversity.
* Ensure safeguarding issues are identified and relevant policies followed.
* Travel across West Sussex and to other locations as may be required.
* Support and actively engage in fundraising activities across CAWS as necessary
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| Administration | * To self-service and use a range of resources and technology to perform the role
* Manage own work and ensure deadlines are met, quality standards and procedures are followed.
* Ensure accurate and timely recording of data, ensuring the case management systems are up to date and processes followed to meet funder, social policy and monitoring requirements.
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 Person specification

**Knowledge and Experience**

* **Able to be accredited casework/specialist level in accordance with the MAS Quality Framework.**
* **Experience of delivering high-quality advice and casework or have two years’ full time (2,200 hours) or equivalent part-time experience of delivering debt advice.**
* **Ability to maintain a debt advice caseload across the breadth of debt advice topics and range of complexity and keep their own technical knowledge up to date by completing CPD 16 points.**
* **Expert knowledge of, and proven ability of providing debt advice to DAPA (or equivalent) standards and FCA requirements.**
* **Knowledge of the Money Advice Service DAPA scheme (previously Peer Review Scheme)**
* **Awareness of, and ability to, understand and empathise with clients from a diverse range of backgrounds and disadvantaged groups living in the community to provide outstanding customer service.**
* **Up to date knowledge of the key issues of debt advice arising from legislation, regulation, policy, practice and services.**

**Skills**

* **Ability to deliver advice and casework over multiple channels including Face to Face, phone, email, video and web chat advice to clients.**
* **A proven commitment to continuing professional development.**
* **Excellent negotiation and communication skills both in writing and verbally, able to communicate with a range of audiences and at different levels.**
* **Excellent organisation skills, able to meet deadlines and prioritise own work and support others.**
* **Excellent IT skills, able to independently use a range of applications, software and Microsoft office**

**Attributes**

* **An understanding of safeguarding and able to apply this in the work**
* **A demonstrable commitment to equality, diversity and inclusion and able to apply this to different aspects of your work**
* **Able to travel to different locations**

**Desirable**

* **Experience of training and mentoring volunteers or trainees**

 Terms and conditions

**1. SALARY: As advertised**

Appointment for this role will be paid at the advertised salary.

**2. ANNUAL/TOTAL LEAVE**

 Annual leave days are 23 days per annum plus bank holidays, there is also the opportunity to gain an additional day for long service. After 4 years of service an additional leave day will be added up to the maximum of 5 additional days.

**3. PENSION SCHEME**

Citizens Advice provides a pension scheme through Bluesky Section of Crystal. Further details of this scheme will be provided to the successful applicant at offer and contract stage.

**4. LEARNING AND DEVELOPMENT**

 Citizens Advice in West Sussex has a co-ordinated staff training and development strategy. This will mean that training for your current job, and future career developments relevant to Citizens Advice in West Sussex will be provided and you will be encouraged to take an active role.

**5. DISCLOSURE AND BARRING SERVICE CHECKS (DBS)**

 Some Citizens Advice positions may require the successful candidate to undergo a DBS check.

**6. EQUALITY AND DIVERSITY**

 Citizens Advice in West Sussex recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable. Citizens Advice will not discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, transgender, disability, nationality, national or ethnic origin, religion or belief, marital/partnership or family status, sexual orientation, age, social class, educational background, employment status, working pattern, trade union membership or any other irrelevant factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other. All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles. Breaches of the policy may lead to disciplinary action.

**7. DIGNITY AT WORK**

Citizens Advice in West Sussex is committed to providing a culture in which all staff value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

**8. PROBATIONARY POLICY**

New appointments are subject to a six months probationary period. Performance is reviewed after three months and again after six months. At the end of the probationary period the outcome of the assessment may be confirmation of post; notice of dismissal; or at Citizens Advice’s discretion, an extension of the probationary period by a further three months.

**9. POLITICAL IMPARTIALITY**

 An important part of the principle of impartiality is that Citizens Advice in West Sussex staff are seen to be upholding the principle of party political impartiality. To avoid possible misunderstanding or possible conflicts of interest guidelines have been established on staff taking part in party political activities. If you currently hold, or are intending to stand for local or national party political office, we will expect you to tell us about this if shortlisted for interview.

**10. LOCATION**

As advertised

**11. EMPLOYMENT STATUS**

 As advertised

**12. FLEXIBILITY**

 Our roles are open to discussion about flexible working, which may include arrangements such as part-time working, formalised flexitime, fixed (non-standard) working hours, working from home and job-sharing.

**13. HOURS OF WORK**

 As advertised

 Normal full time working hours are 9 - 5, Monday to Friday, although these hours may vary from week to week to meet the needs of the job. Staff may be able to agree a different working pattern with their manager.

 What we give our staff

We value the people who work here - and we show that in what we offer. As well as things like annual leave and our workplace pension, working at CAWS means getting access to many benefits.

* A commitment to your development. We have a coordinated staff training and development strategy. This means that training will be provided both for your current job and for your development.
* Employee assistance programme. Everyone working at CAWS has immediate access to professional and completely confidential counselling and legal advisory services.
* Support when things in your life change. We’ll be there for you with options for flexible working, career breaks, and support for parents and carers.

You can find out more about what we offer our employees [on our website](https://www.advicewestsussex.org.uk/about-us/jobs/)

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|  | Equality and diversity at CAWS  |

Citizens Advice is fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

* We judge the application, not the person. The select panel won’t see your personal details. This makes sure each person’s response is judged on its merits and not on their background.
* We offer a guaranteed interview scheme. If you have a disability and your application meets the minimum criteria for the post, we’ll interview you for it.
* We’re a Disability Confident employer. We’re committed to changing attitudes towards disability, and making sure disabled people have the chance to fulfil their aspirations.
* We’re part of the Equality and Diversity Forum. This means we’re committed to progress on age, disability, gender, race, religion and belief, sexual orientation and broader equality and human rights issues.

Guidance for applicants

**Application form alternative formats**

If you need this information or any of our job application forms in an alternative format, for example, large print, audiotape, Braille or Easy Read, please contact us on 01903 252699 or at Recruitment@westsussexcab.org.uk. We are happy to receive applications in alternative formats.

**Important note**

The electronic application form plays a key part in our recruitment and selection process. We use the information you provide to decide whether or not to invite you for an interview. It is important that you complete the application form as fully and accurately as possible, ensuring that you give specific examples which demonstrate how you meet the essential and desirable criteria for the role for which you are applying. Incomplete applications are unlikely to pass shortlisting. Please read this document for guidance on how to complete the form.

**Disability**

We have made a positive commitment to employing disabled people and guarantee to interview all disabled candidates who meet the **minimum essential criteria** for the role as set out in the role profile and person specification. If you wish to apply for consideration under the Guaranteed interview scheme, please complete the appropriate section on the application form.

You can also use this section to let us know if you require any adjustments to be made to the shortlisting process or to provide any information you wish us to take into account when considering your application. If you are selected for interview, we will ask you to let us know if you have any access needs or may require reasonable adjustments to the interview or assessment (if applicable) at that stage. Please be assured that we will be supportive in discussing reasonable adjustments with you at any stage of the recruitment and selection process.

**Instructions on how to complete the Supporting information page: Information, experience, knowledge, skills and abilities section of the application form**

This is a **key section**of the application form which allows you to provide evidence of your experience, knowledge, skills and abilities that are relevant to the role as described in the role profile. Selection is based on an assessment of the evidence you provide against the requirements of the role as set out in the person specification. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities.

Please provide one example for each requirement in the person specification (found in the job pack). You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it and the outcome or result of your actions. Please try to limit your response to each criterion to a maximum of 200 words.

A useful guide might be **S.T.A.R**:

* **Specific** – give a specific example
* **Task** – briefly describe the task/objective/problem
* **Action** – tell us what you did
* **Results** – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family or home responsibilities, can also be given.

**Entitlement to work in the UK**

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 1996. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made.

Please note that Citizens Advice in West Sussex does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

**Diversity monitoring**

Citizens Advice in West Sussex values diversity and promotes equality. We encourage and welcome applications from suitably skilled candidates from all backgrounds. Monitoring recruitment and selection procedures is one way of helping us to ensure that there is no unfair discrimination in the way that we recruit people. To do this we need to know about the diversity profile of people who apply for posts at CAWS. This information is given in confidence for monitoring purposes only and is not seen by anyone responsible for making recruitment decisions. However, if you would prefer not to answer any of the questions we ask, please pick ‘prefer not to specify’

**GDPR: How we will use your information**

The information you provide on this form will be used to help us decide whether to recruit you as a member of staff - this is our ‘legitimate interest’ under data protection law. It will only be seen by staff involved in the recruitment process, and will be stored securely.

If you are recruited we will retain your contact information in order to involve and support you. We will also collect additional information, such as next of kin details, and over time records of training, support meetings and where relevant, appraisals. Again, it will be kept securely, and only those people who need to see your information in order to involve you will have access to it.

All use of applicant’s information will be relevant to their involvement, and may include:

* Contacting applicants when necessary
* Making reasonable adjustments to improve accessibility
* Monitoring statistical details of our applicants
* Providing ongoing support to applicants
* Addressing problems or complaints

You have legal rights over your data, including access to it, and the right to ask that it is corrected, restricted or deleted. There is more information on these rights on the Information Commissioner’s Office website: [www.ico.org.uk](http://www.ico.org.uk/)

If you have any questions about the use of your data, please contact the Recruitment Team by emailing: Recruitment@Westsussecab.org.uk

**Shortlisting outcomes**

Shortlisted applicants will be invited for an interview. Some positions may require additional assessments (practical task/test or assessment centre). If this is the case, you will have received details either with the application pack or further details will be provided if you are shortlisted.

**References**

All job offers are subject to the receipt of two satisfactory references: one of these should be your present or most recent employer, the other could be someone who knows you in a work related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the post applied for.

**Health declaration**

All job offers will be subject to medical assessment. If you are successful at interview, we will ask you to complete a confidential medical questionnaire which will be screened by our independent occupational health provider.

The health questionnaire is not viewed by Citizens Advice staff and is sent directly by applicants who have been offered employment to our occupational health provider. The advice they give us will not identify specific health problems.

**Complaints procedure**

Any applicant who considers that they have been unfairly treated or discriminated against should be advised to contact the HR Officer, in writing, or by email, as soon as possible. Complaints received within one month will be taken seriously and investigated promptly and sensitively by the HR Officer who will advise of the outcome. This does not affect your legal rights.

**Email**: Recruitment@westsussexcab.org.uk

**Address:**
HR Officer

Worthing Town Hall

Chapel Road

Worthing

BN11 1HA