



Specialist Money Advice Caseworker Job pack

Thanks for your interest in working at Citizens Advice Epsom & Ewell. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice Epsom & Ewell
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Jennie Purvis by emailing support@caee.org.uk or calling 01372 300777.



Our values

We're inventive. We're not afraid of trying new things and learn 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 will be supportive and straight with you, 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.



3 things you should know about us

1. We're local and we're national. We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.

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.

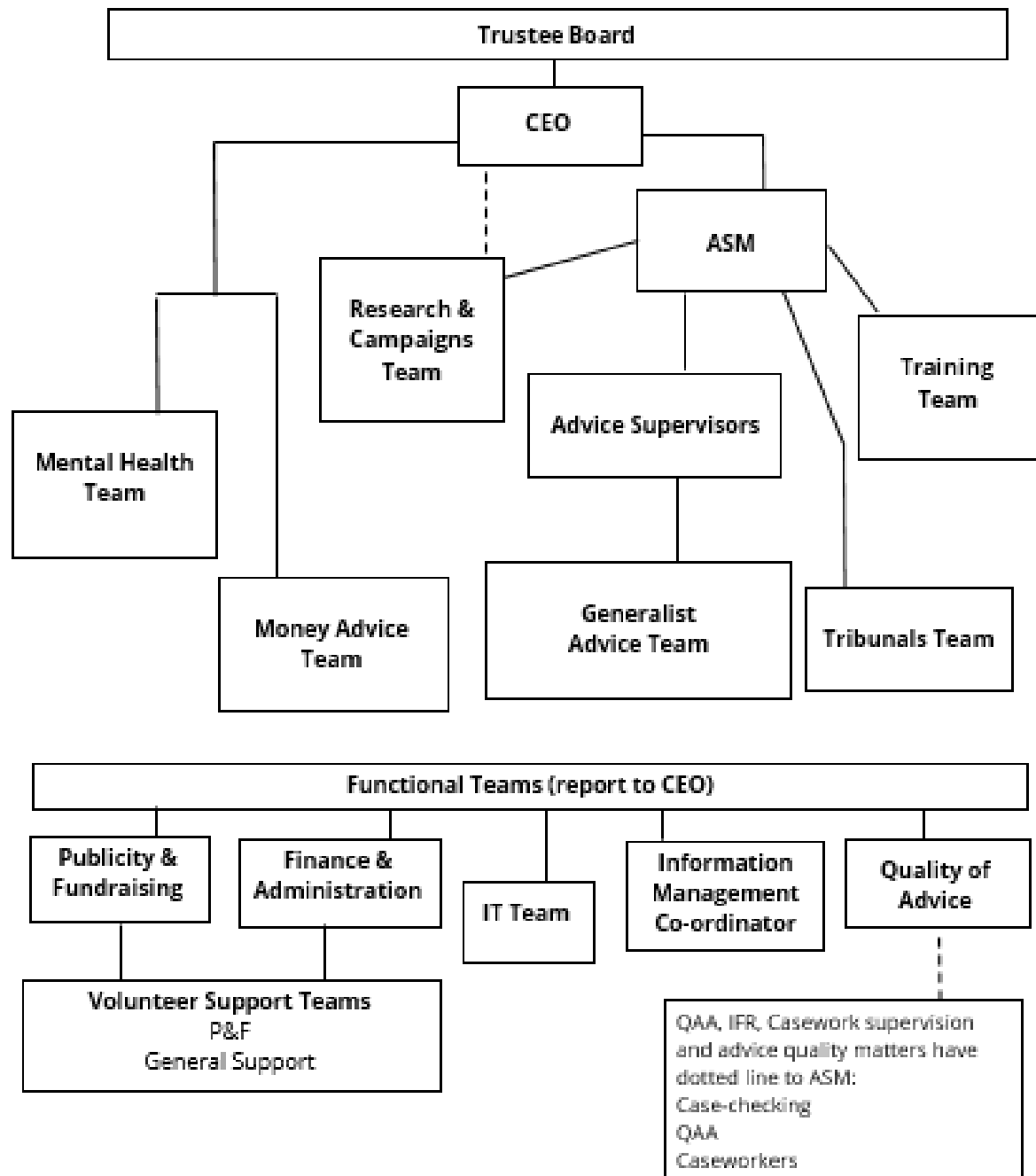
3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

About Citizens Advice Epsom & Ewell

Location:	The Old Town Hall, The Parade, Epsom, Surrey, KT18 5AG
Service Delivery:	We deliver our service through as many different channels as we can, to make sure we are accessible to everyone. This includes face to face, phone, video conferencing, and email. The role is office based but there is the opportunity for some hybrid working.
Specialist services:	Specialist Money Advice for local people with critical debt issues Mid and East Surrey Mental Health Outreach service for clients with mental health issues across Mid and East Surrey. Legal Aid Housing solicitor Tribunals & Appeals
Specialist access:	Textphone for deaf clients, Wheelchair access, Disabled toilet, Phone translation service
Number of new enquiries:	Approximately 3,000 per annum
Number of client contacts:	Approximately 13,000 per annum
Main types of enquiries:	Benefits, debt and housing.
Number of volunteers:	50 advisers and assessors (incl. trainees) 13 paid staff 9 members of the Trustee Board
Area served:	Borough of Epsom and Ewell
Population:	80,900 (taken from the 2021 census)

While Epsom & Ewell as a whole is relatively well-off, this masks 2 wards with the highest deprivation indices. Epsom & Ewell has the highest percentage of ethnic minority groups among all the districts in Surrey.

Organisation Chart



Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

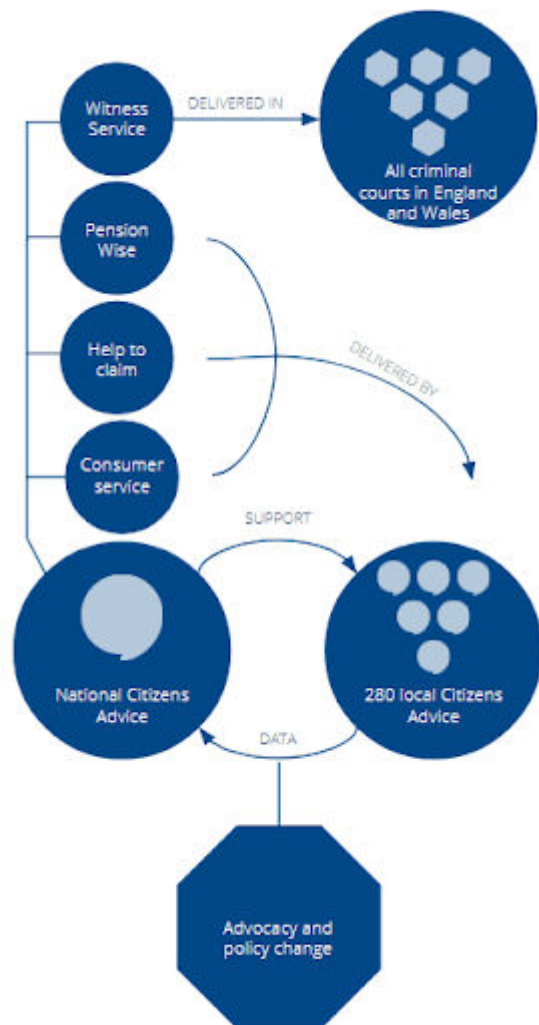
This role sits within our local network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.





The role

- Debt has been a rising social problem, which will become worse as the well-publicised increases in cost of living continue at pace. As a Specialist Money Advice Caseworker, you will work within the aims and principles of the Citizens Advice Service to provide high quality free advice to a wide range of clients, assisting them to achieve the best outcome for their circumstances.



Role profile

Casework

- Provide casework covering the full range of the money advice counselling, adjusting and credit information.
- Identify the debt issue and support the client to its resolution, as appropriate.
- Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate and negotiate with third parties as appropriate.
- Assist clients where necessary by calculating, negotiating, drafting or writing letters or emails and telephoning third parties.
- Ensure income maximisation for clients through the take up of appropriate benefits and budgeting advice
- 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.
- Maintain case records for the purposes of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Ensure that all casework conforms to CAEE's office processes and procedures, the Advice Quality Standard, FCA regulations and funder's requirements.
- Provide advice and assistance to other CAEE staff across the whole range of debt and related issues.
- Contribute to the efficient working of the team in delivering against the project's requirements, ensuring project specific action is carried out.

Research & 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 the organisation's management and key stakeholders.

Professional Development

- Keep up to date with legislation, case law, policies and procedures relating to money advice and undertaking appropriate training.
- Prepare for and attend relevant internal and external meetings as agreed with the line manager.
- Prepare for and attend supervision session/team meetings/management team meetings as appropriate.
- Assist with service initiatives for the improvement of services.

Administration

- Use IT for statistical recording, record keeping and document production.
- Review and make recommendations for improvements to services.
- Liaise closely with relevant external agencies, both statutory and non-statutory and represent the service on outside bodies as appropriate.

Other

- Perform any other tasks commensurate with the role, as directed by line manager.



Person specification

- Highly motivated with recent, relevant Money Advice experience or a similar transferable skill set, including in a volunteering capacity. CertMap preferable but not essential. Applicants who are passionate about helping clients and are willing to train as a Citizens Advice Specialist Money Adviser will also be considered.
- Effective communication skills (oral & writing) with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
- Fully understand the issues involved in interviewing clients and demonstrate an understanding of social trends and their implications for clients and the service.
- Have an ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
- Experience of utilising IT in the provision of advice and the preparation of reports and submissions.
- Well-organised and able to monitor and manage a demanding caseload to meet deadlines.
- Numerate to the level required in the casework tasks.
- Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
- Ability to build rapport with clients in difficult circumstances.
- Ability and willingness to work as part of a team and without close supervision.
- Understanding of and commitment to the aims and principles of Citizens Advice and its equality and diversity policies.

In accordance with Citizens Advice national policy we may require the successful candidate to be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.



Terms and conditions

Salary:	£28,000 - £31,000 FTE depending on relevant experience and/or qualifications.
Employer pension contribution:	3%
Annual leave:	25 days (plus bank holidays) pro-rata
Hours per week:	Part time up to 22.5 hours per week (0.6FTE). Minimum obligation of 15 hrs per week (0.4FTE).
Type of contract:	Permanent
Location:	The Old Town Hall, Epsom with potential for some hybrid working