

**Trainee Debt Adviser**

Job pack

Thanks for your interest in working within the Citizens Advice service. This job pack should give you everything you need to know to apply for this role and what it means to work within the Citizens Advice service.

In this pack you’ll find:

* Our values
* 3 things you should know about us
* Overview of the Citizens Advice service
* Overview of the project
* The role profile and person specification
* Our approach to equality and diversity
* Terms and conditions of employment

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|  **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 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. We’re local and we’re national**. We have 6 national offices and offer direct support to people in 270 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. |

 **Overview of the Citizens Advice service**

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| The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 270 local Citizens Advice members.Bridport and District is a local Citizens Advice office covering an extensive area of Western Dorset which includes 3 towns (Bridport, Beaminster and Lyme Regis) and 24 outlying parishes and parish groups. We are an independent charity in our own right. We serve a population of 37,000 people and help 2500 clients a year with benefits, debt, housing, employment and other enquiries. We are supported by a small paid staff team and over 60 volunteers. We offer specialist services in benefits, including appeal tribunal representation, and debt advice. We work in close partnership with the other Citizens Advice in Dorset (CAiD) including jointly staffing the Dorset Adviceline telephone service. |  |

 **The project**

National Citizens Advice has secured funding for the Network to help offices support people through the Cost of Living Crisis and to assist ourcore/generalist advice service delivery over 12 months.

Bridport and District Citizens Advice are using this funding to enhance debt advice provision and are aiming to increase capacity. This will be through the training and supervision of new volunteers to undertake debt work and recruitment of a part time debt trainee.

 **The role**

We want people who are passionate about giving an effective service to those most in need. You will need to demonstrate that you can engage skilfully with clients who are vulnerable and distressed and have proven skills at working in a busy environment.

You will be a highly motivated strong team player with excellent interpersonal and organisational skills. You will have the ability to understand written and oral information of some complexity; have good numeracy skills sufficient to compile accurate financial statements and calculate benefits; and, have effective oral and written communication skills for the purposes of negotiation and reporting.

You will be based within and employed at the Bridport Citizens Advice office. You will be trained to give debt advice predominantly through face to face and telephone interactions.

You will undertake Money Advice and Pensions Service accredited debt advice-level training to be completed within two months of starting your employment. You will then be expected to undertake initial debt assessments and explorations with clients and build your advice skills with ongoing casework level training thereafter. Subject based training will mainly consist of online self-study learning modules and some observations of debt advice and casework.

The role is initially fixed for 12 months but could be extended subject to further funding.

**The Citizens Advice service values diversity, promotes equality and challenges discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled and Black, Asian and Minority Ethnic people, as they are currently under represented in our workforce**

 **Role profile**

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| **Job Title:** |  **Trainee Debt Adviser**  |
| **Reporting to:** |  **Advice Service Manager** |
| **Salary:** |  **£25,409 starting salary, increasing to £26,845 after completing initial training and satisfactory 3 month probationary period** |
| **Hours of work** |  **17 hours per week**  |
| **Locations:** | **Bridport & District main office** Some travel to our outreach locations may be required.  |
| **Role purpose:** | To train in and deliver a good quality debt advice service to clients, with due regard to the aims, policies and procedures of the organisation and service, working within a client focussed and responsive team. |
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|  **Training** | To attend and successfully complete debt advice training to advice level within the first two months.Thereafter, undertake specialist training (to casework and court representation level). Attend learning events and carry out learning activities in line with Continuing Professional Development requirements for debt advisersKeep up to date with legislation, case law, policies and procedures relating to money advice, and attend appropriate training; including reading relevant publicationsTo identify and develop your own learning opportunities |
| **Working with Clients** | Once fully trained, be supported to provide the of debt casework complying with our quality standards: * Sensitively explore the client’s situation, including household and financial circumstances and details of debts
* Identify areas where clients could maximise income or minimise expenditure, such as benefit claims, and offer support or signpost/refer to other agencies where appropriate
* Provide information and advice to empower clients to act on their own behalf, including confirmation of advice and signposting to other agencies where appropriate
* Explore options and implications to enable the client to make informed decisions
* Provide full casework to the client where necessary, identifying the debt issue through to its resolution
* Provide the advice and/or casework through a mixture of channels, predominantly face to face and telephone.
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| **Contribute to team** | Contribute to the efficient working of the team in delivering against any project delivery requirementsEngage with team members, sharing knowledge and good practice and supporting each other to problem solve 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 |
| **Management Information** | Set up and maintain casework and other admin systems as requiredMaintain client records to required standards on the organisation’s information system Ensure clients are encouraged to feedback on the service they received. Share with management and team for continuous development of service delivery  |
| **Quality** | Meet the requirements of Citizens Advice Quality Framework and Financial Conduct Authority and engage with Quality supervision and support services |
| **Equality and Diversity** | Ensure that work undertaken reflects and supports the service’s Equality and Diversity Strategy |
| **IT Proficiency** | Develop and maintain Information Technology proficiency to support your work requirements |
| **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 organisationUndertake any other duties as might be reasonably required within the scope of the role.Work under the direction and supervision of the advice services manager. |

 **Person specification**

**Essential**

* An ability to demonstrate a high level of commitment to training, identify own training needs and participate in continued personal development opportunities
* The ability to prioritise tasks and work to deadlines using own initiative
* The ability to communicate effectively, both orally and in writing with a range of people and organisations
* Good numeracy skills with the ability to carry out efficient calculations and prepare budgets for clients
* Ability to use IT for statistical recording, record keeping and document production
* The ability to work effectively and collaboratively as part of a team and work without close supervision
* Ability and willingness to follow agreed procedures
* Ability to work in a sensitive, enabling and non-judgemental way with people from a wide range of backgrounds
* Ability to maintain confidentiality and appropriate professional boundaries
* Understanding of and commitment to the aims and principles of the Citizens Advice service.

**Desirable**

* Knowledge and awareness of debt advice services
* Appreciation of the local community and social challenges in the area and their implications for clients and service provision