**NORTH BRISTOL ADVICE CENTRE**

**Job Description and Person Specification**

**Job title:** Money Advice Caseworker

**Responsible to:** Debt Team Leader

**Caseworker salary:** £27,000 - £28,300 (FTE) depending on experience

(if trainee, starting salary £23,000)

**Working hours:**  21 hours per week

**Place of work:** 2 Gainsborough Square, Lockleaze, Bristol, BS7 9XA

(Flexible & hybrid working considered)

**Probationary period:** Three months

**Main Purpose of Job**

The delivery of money advice and casework contributing to NBAC’s wider mission of providing services that strengthen the health and wellbeing of the communities we serve.

**Responsibilities**

1. To deliver generalist and specialist debt advice services by means of face-to-face and telephone.
2. Working to a target set by the Money and Pension Service.
3. Independently manage a caseload alongside weekly appointments.
4. Provide clients with income maximisation and financial capability support
5. Assist clients where necessary by calculating, negotiating, drafting or writing letters and telephoning
6. Maintain accurate case records in our dedicated case management system
7. Prepare for and attend supervision sessions/team meetings/management team meetings as appropriate.
8. Provide case studies and feed into NBAC’s wide social policy work
9. To work at all times within NBAC’s policies and procedures as detailed in the NBAC Staff Handbook and Office Manual.
10. To undertake other reasonable tasks as required to ensure compliance with funding agreements/contracts and to assist in the running of the service.
11. To ensure that the Equality and Diversity policy of the Centre is implemented in all aspects of the work of the post holder
12. Keep up to date with legislation, case law, policies and procedures relating to debt advice and undertaking appropriate training.

**Money advice caseworker -Person Specification**

**The post-holder is required to be self-motivated with strong communication skills, able to work as part of a team and prioritize their own workload.**

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|  |  | **Essential** | **Desirable** |
| **Education, Vocational Training & Qualifications** | * Degree or equivalent relevant qualification, or substantial training and experience in relevant role * GCSE in English and Maths or equivalent * Evidence of continuing professional development and training * Qualified in Money Advice to MaPS contract standard * Experience of working as an approved Intermediary | **X**  **X**  **X** | **X**  **X** |
| **Experience** | * Experience of working in an advice and/or guidance related role * Experience of helping people with money related problems * Proven experience of working under pressure and achieving individual targets against contract demands * Experience of using electronic case management systems * Experience of using the Advice-Pro software system | **X**  **X**  **X** | **X**  **X** |
| **Knowledge and Understanding** | * Understanding the voluntary sector * Knowledge of the debt advice solutions and categorisation of debts (i.e. priority and non-priority) * Up to date knowledge of the main welfare benefits and welfare reform changes * Understanding of the advice environment * Understanding of the needs of service users in a disadvantaged area | **X**  **X**  **X** | **X**  **X** |
| **Technical Skills and abilities** | * Proficient in IT skills, e.g. in the use of Word and Excel * Effective communication skills (oral & writing) with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence. * Have an ordered approach to casework and an ability and willingness to follow and develop agreed procedures. | **X**  **X**  **X** |  |
| **Interpersonal skills, motivation and commitment** | * Ability to liaise effectively and positively with a wide range of individuals and organisations * Able to work on own initiative, prioritising and managing own workload and time to meet targets and deadlines * Ability to work effectively as part of a team * A flexible approach to work * A commitment to work within NBAC’s Equality and Diversity Policy | **X**  **X**  **X**  **X**  **X** |  |