

# NORTH BRISTOL ADVICE CENTRE

## Job Description and Person Specification

**Job title:** Money Advice Caseworker

**Responsible to:** Advice Team Manager

**Caseworker salary:** £25,000 - £26,500 depending on experience (if trainee, starting salary £22,000)

**Working hours:** 35 hours per week

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

**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 (both at NBAC's offices and outreach locations), telephone and email appointments
2. Provide clients with income maximisation and financial capability support
3. Assist clients where necessary by calculating, negotiating, drafting or writing letters and telephoning
4. Maintain accurate case records in our dedicated case management system
5. Prepare for and attend supervision sessions/team meetings/management team meetings as appropriate.
6. Provide case studies and feed into NBAC's wide social policy work
7. To work at all times within NBAC's policies and procedures as detailed in the NBAC Staff Handbook and Office Manual.
8. To undertake other reasonable tasks as required to ensure compliance with funding agreements/contracts and to assist in the running of the service.
9. To ensure that the Equality and Diversity policy of the Centre is implemented in all aspects of the work of the post holder
10. 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.

		Essential	Desirable
<b>Education, Vocational Training &amp; Qualifications</b>	<ul style="list-style-type: none"> <li>• Degree or equivalent relevant qualification, or substantial training and experience in relevant role</li> <li>• GCSE in English and Maths or equivalent</li> <li>• Evidence of continuing professional development and training</li> </ul>	X   X  X	
<b>Experience</b>	<ul style="list-style-type: none"> <li>• Experience of working in an advice and/or guidance related role</li> <li>• Experience of helping people with money-related problems</li> <li>• Proven experience of working under pressure and achieving individual targets against contract demands</li> <li>• Experience of using electronic case management systems</li> <li>• Experience of using the Advice-Pro software system</li> </ul>		X     X   X
<b>Knowledge &amp; Understanding</b>	<ul style="list-style-type: none"> <li>• Understanding of the voluntary sector</li> <li>• Knowledge of the debt advice solutions and categorisation of debts (i.e. priority and non-priority)</li> <li>• Up to date knowledge of the main welfare benefits and welfare reform changes</li> <li>• Understanding of the advice environment</li> </ul>	X	    X  X  X

	<ul style="list-style-type: none"> <li>• Understanding of the needs of service users in a disadvantaged area</li> </ul>	X	
<b>Technical Skills &amp; Abilities</b>	<ul style="list-style-type: none"> <li>• Proficient in IT skills, e.g. in the use of Word and Excel</li> <li>• Effective communication skills (oral &amp; writing) with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.</li> <li>• Have an ordered approach to casework and an ability and willingness to follow and develop agreed procedures.</li> </ul>	X  X  X	
<b>Interpersonal skills, motivation and commitment</b>	<ul style="list-style-type: none"> <li>• Ability to liaise effectively and positively with a wide range of individuals and organisations</li> <li>• Able to work on own initiative, prioritising and managing own workload and time to meet targets and deadlines</li> <li>• Ability to work effectively as part of a team</li> <li>• A flexible approach to work</li> <li>• A commitment to work within NBAC's Equality and Diversity Policy</li> </ul>	X  X  X  X	
<b>Other</b>	<ul style="list-style-type: none"> <li>• Access to transport and a willingness to travel locally, regionally and nationally as required.</li> </ul>		X