



Role Description	
Job Title	Social Welfare Law Adviser/ Trainee (Money Advice)
Reports To	Money Advice Supervisor
Accountable To	Director of Advice Services/ Deputy CEO
Location	Working across Bury & Bolton
Hours	35 hours per week
Salary	Experienced, starting at £19,446 Trainee: £17,173 - £19,446

Role Context
Citizens Advice Bury & Bolton is a busy, client focused and dynamic service with a track record of delivering high quality advice. The post holder will work as part of a well-established team, providing a reliable and effective money advice service, across all advice channels and access points, utilised by Citizens Advice Bury & Bolton.

Role Purpose
<ol style="list-style-type: none">a) Direct delivery of support and legal advice to clients on money advice and debt issues, via the full range of delivery channels offered by Citizens Advice Bury & Boltonb) Complying with all quality standards and contract expectationsc) Develop and maintain strong working relationships with colleagues across all levels of Citizens Advice Bury & Bolton, and beyondd) Maintain understanding & awareness of wider social welfare law issues.

Main Duties and Responsibilities
<p>Money Advice and Research & Campaigns Work:</p> <ul style="list-style-type: none">• Assess and effectively diagnose a clients' money advice and debt needs, ensure advice delivered is appropriate and within agreed deadlines

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- Deliver one-off specialist money advice or casework across all activity centres, where funding and priorities allow
- Assist and advise on the preparing of a financial statement, providing template letters and other such means to help the client to progress their case
- Advise clients and assist where necessary on calculating, drafting or writing letters, negotiating with creditors, third parties and/or exercising formal appeal rights, as appropriate
- Research and explore options and implications so that the client can make informed decisions
- Negotiate with stakeholders and obtain sources of evidence from other agencies as required, to progress cases effectively
- Maintain clear case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation
- Regularly review cases, ensuring all key dates/ deadlines are met
- Act as a specialist and provide support to staff and volunteers across the organisation on debt and money advice issues
- Refer/ signpost to other advisers or specialist agencies as appropriate
- Develop and maintain reference and background information around relevant Social Welfare Law
- Monitor advice enquiries, contributing to research and campaign projects locally, and across the Citizens Advice network

Performance, Personal Management and Administration:

- Provide day-to-day support to all advisers dealing with money advice and debt enquiries across all activity centres
- Work flexibly to provide adequate cover for all aspects of the service including outreach sessions, where required
- Take ownership for monitoring own workload e.g. proactively reviewing when new cases taken on, progress on current cases, outcome of completed cases and quality control
- Be responsible for performance management at an individual level through: self-management; delivery of goals and tasks set; targets and outcomes; and reporting progress
- Undertake file reviews and quality of advice assessments, in line with organisation/ contractual requirements and expectations as required (Adviser level only)
- Actively engage in opportunities for learning and development at an individual and team level, ensuring progression against your training and progression plan
- To comply with operational management systems of supervision, objectives, appraisal and induction
- To comply with data collection procedures and reporting to ensure effective recording of performance monitoring, outcomes and client information
- Provide written and/or oral updates as required

Service Development:

- To assist with the development of the service locally, regionally and nationally, publicising work as and when necessary
- Liaise with relevant outside agencies (voluntary and statutory), other Local Citizens Advice and other stakeholders

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- Identify and feedback improvements to services and systems
- Work with colleagues to maintain a positive working and learning environment, in which equality and diversity are well managed, dignity at work is upheld and volunteers achieve their full potential
- Carry out other tasks within the scope of the post to ensure the effective delivery and development of the role

Training:

- To ensure through reading, training and consultancy, that your own level of knowledge around money advice law is up-to-date and that this is disseminated as appropriate
- To identify your own training needs in conjunction with the designated lead/ supervisor and be prepared to undertake appropriate training in line with your training and progression plan
- Deliver training (internally and/ or externally), either through formal training sessions, or 'on the job' coaching to colleagues (Adviser only)

General Duties

- To present a professional appearance, help maintain an orderly working environment, and act at all times to uphold the good reputation of Citizens Advice Bury & Bolton
- To ensure service users' and professionals' experience of Citizens Advice Bury & Bolton is positive, by taking personal responsibility for answering ringing telephones and promptly dealing with inappropriate behaviour by staff, volunteers or service users
- To attend meetings at appointed times, maintain professional service user records and meet deadlines
- To work flexibly across the whole service, including providing late working cover/ support as required
- To work within professional boundaries maintaining safety and appropriate confidentiality at all times
- To comply with all published Citizens Advice Bury & Bolton policies and procedures
- To work flexibly to undertake such other reasonable duties and responsibilities, at any location within reasonable daily travel from your main place of work
- Participate in undertaking periodic reviews of this job description for consideration by the Trustee Board
- To undertake any other tasks as directed by the Social Welfare Law Manager or Leadership Team

Assessment Criteria	
All criteria are <u>Essential</u> unless otherwise indicated	A: Application – assessed at application stage
	I: Interview – assessed at assessment/ interview stage
Experience (through paid or voluntary work)	A / I
At least 2 years' experience, or equivalent, in debt advice (desirable)	A/I
Experience of delivering advice in a social welfare context (desirable)	A/I
Experience of managing a high workload (desirable)	A/I
Experience of flexible working, according to business need, while balancing multiple priorities	A/I
Experience of working within an advice and information organisation within the third/ charity sector (desirable)	A/I
Experience of working within the remit of the Money and Pension Service (MaPS)/ Money Advice Service (MAS) (desirable)	A/I
Experience of Financial Capability work debt intervention, or demonstrable willingness to develop this area (desirable)	A/I
Experience of communicating effectively, both orally and in writing, with a wide range of people, using a variety of channels	A/I
Knowledge	
Demonstrable understanding and awareness of the relationship between money advice / debt and other areas of Social Welfare Law (desirable)	A/I
A thorough understanding of professional boundaries and the issues surrounding confidentiality	A/I
Literate and numerate to the level required by the tasks	A/I
Qualifications and Training	
Holder of Certificate in Money Advice Practice (CertMAP) (desirable)	A/I
A commitment to continuous professional development (CPD), including a willingness to develop knowledge and skills in required areas	A/I
Qualified DRO intermediary (desirable)	A/I
Skills and Abilities	
Ability to work on own initiative, proactively manage a varied workload, ensuring deadlines are met	A/I
Ability to interpret regulations and explain them to clients and colleagues and to produce clear advice and empowerment	A/I
Effective written and verbal communication skills, including the ability to deal appropriately with a range of people via face-to-face, telephone and digital communication methods	A/I

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The ability to build effective working relationships with local and regional partners	A/I
Ability to contribute as a member of the staff team but also work on own initiative and without close supervision	A/I
Ability to monitor and maintain own standards	A/I
Ability and willingness to assimilate new information and learn new skills quickly including information technology	A/I
Demonstrable ability to use IT systems and packages, and electronic resources in the provision of advice, record keeping and document production	A/I
Additional Factors	
Understand and support the Citizens Advice aims and principles as well as having an awareness of advice work issues and the importance of research and campaigns work	A/I

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