



Role Description	
Job Title	Social Welfare Law Adviser (Money Advice) (we will consider trainee)
Reports To	Money Advice Supervisor
Accountable To	Deputy CEO
Location	Working across Bury & Bolton, and designated outreaches as required
Hours	35 hours per week
Salary	Experienced: starting at £21,589 - £25,801 Trainee: £18,065 - £19,945

Role Context
<p>Citizens Advice Bury & Bolton is a busy, client focused and dynamic service with a track record of delivering high quality advice.</p> <p>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. Our Money Advice team provide support and empower clients to manage their finances, maximise income and assess their best strategies and options to address their debt issues long term.</p>

Role Purpose
<ul style="list-style-type: none">• 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 & Bolton• Complying with all quality standards and contract expectations• Develop and maintain strong working relationships with colleagues across all levels of Citizens Advice Bolton, and beyond• Maintain understanding & awareness of wider social welfare law issues.

Citizens Advice Bury & Bolton 26-28 Mawdsley Street, Bolton BL1 1JL

Registered Charity in England and Wales (No. 1102536). Company Limited by Guarantee No. 5030345.
VAT Registration No. 768 279 472. OISC Registration No. F201400861.

Main Duties and Responsibilities

Money Advice and Research & Campaigns Work:

- Assess and effectively diagnose a clients' money advice and debt needs, ensure advice delivered is appropriate and within agreed deadlines
- Deliver one-off specialist money advice or casework across all activity centres, where funding and priorities allow
- Assist and advise on the preparation 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 are 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
- 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 level 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 clients' and professionals' experience of Citizens Advice Bolton is positive, by taking personal responsibility for answering ringing telephones and promptly dealing with inappropriate behaviour by staff, volunteers or clients
- 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 Executive Team.

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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	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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