



Abertawe Castell-nedd
Port Talbot
Swansea Neath
Port Talbot

Trainee Debt Caseworker

Job Pack

Thank you for your interest in working at Citizens Advice Swansea Neath Port Talbot Swansea Neath Port Talbot. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice Swansea Neath Port Talbot Swansea Neath Port Talbot.

In this pack you'll find:

- Our values
- 4 things you should know about us
- Job Description & person specification
- Key accountabilities
- Terms and conditions
- What we give our staff
- Equity, diversity & inclusion at Citizens Advice Swansea Neath Port Talbot

Want to chat about this role?

If you want to chat about the role further, you can contact **Julie Browne** by emailing **Julie.browne@citizensadvicesnpt.org.uk**

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.

4 things you should know about us

1. **We provide free, confidential, independent and impartial advice** to everyone on their rights and responsibilities and we value diversity, promote equality and challenge discrimination.
2. **We're local and we're national.** Citizens Advice have 6 national offices and offer direct support to people in over 300 independent local Citizens Advice services across England and Wales of which Citizens Advice Swansea Neath Port Talbot is one.
3. **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.
4. **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.



Job Description

We are looking for someone with good communication, interpersonal and organisational skills. We need a confident, motivated individual with lots of initiative, who can work particularly well independently as well as part of a team.

We are seeking candidates who are adaptable and responsive to change, who can work to tight deadlines - with a strong commitment to working as part of a dynamic and multi-skilled team within a busy local office.

After a period of training you will be:

- Working as part of a team of specialist advisers across a range of funded projects
- Experienced, enthusiastic and a fully qualified specialist caseworker providing and maintaining in-depth casework to individual clients referred by partner organisations, health care professionals or self-referred.
- Advising and supporting clients who seek advice about their debt problems. In particular, gathering information and assisting the client to ensure that the best possible outcome is achieved.
- Required to keep up to date with relevant developments in the information area to ensure that the client receives the most up to date support and advice.

Reports to: Core Services Manager

Responsible for: The delivery of high quality advice

Accountable for: Citizens Advice Swansea Neath Port Talbot (CASNPT) meeting funder and Citizens Advice Membership Scheme requirements.

Location: Neath, Port Talbot or Swansea. The postholder may be asked to work at any of the LCA locations on a temporary or permanent basis for training or service delivery purposes.

Salary: £23,944 - £27,503 depending on experience. However, expect to start on the lower end of the scale and move up the scales as you meet training competencies (these rates are currently under review)

Hours: 37 hrs (part time considered, minimum 22.5hrs)

Term: Permanent (continuation will be dependent on funding)



Key accountabilities after initial training

Main Duties related to casework

- Assess clients' needs and provide one off money or debt advice and casework through a mixture of channels, including digital, telephone and face to face, across the organisation and within partner agencies.
- Explore options and implications to enable the client to make informed decisions.
- Give information and advice for clients to empower them to act on their own behalf including signposting to other agencies.
- Provide detailed casework encompassing the full range of money advice, including assistance with bankruptcy, Debt Relief Orders, challenging liability, court processes, financial capability and representation at court.
- Negotiate with third parties, including statutory and non-statutory organisations as required.
- Act for or advise the client with other problems where they are an integral part of their case.
- Produce and validate accurate financial statements in accord with company practices.
- Ensure income maximisation through identification of and applications or appropriate benefits or application for other financial assistance.
- Maintain case records to required standards on the company data system.
- Maintain delivery of key areas of casework such as work brought forward, key dates and deadlines, closure of cases etc.
- Use IT for statistical recording, record keeping and document production.
- Provide cover as appropriate for other caseworkers who may be absent.
- Participate in peer and file review systems organised within the company or by external funders or bodies.
- Meet the performance targets set by the organisation and inform the Senior Manager as a matter of urgency with regard to any problems in meeting performance targets.
- Keep abreast of current practice and case law in the field of debt and money advice and attend any training required. As well as attending relevant internal and external meetings as agreed with the line manager.

Research and Campaigns

- Assist with research and campaigns work by providing information as appropriate.
- Provide statistical information on the number of clients and nature of cases and provide regular reports to bureau management.

- Monitor service provision to ensure that it reaches the widest possible client group.
- Alert other staff to local and national issues.

General Core Principles

- Maintain basic fluency in the use of information technology.
- Abide by Health and Safety instructions and policies in use within the company.
- Participate in research & campaigns work, as organised within the company and at regional or national level by raising evidence forms, providing case studies etc.
- Uphold the Equality and Diversity aims, principles and procedures of the Citizens Advice Service and the company.
- Attend relevant learning and development training, to maintain continuing professional development, in accord with the company learning plan or external bodies requirements.
- Supply statistics required for funders in a timely manner and utilise company or team datasets to uphold or improve practice and productivity.
- Attend meetings arranged within the company, or an external partner agencies or within the Citizens Advice Service, that are relevant to the role.
- Uphold information assurance, data security, confidentiality and other client care practices.
- Perform any other tasks commensurate with the role, as directed by a Senior Manager.

Other duties and responsibilities

- Be as flexible as possible to accommodate changes in working pattern and work location in order to meet the needs of the business.

This is not an exhaustive list of tasks and the postholder may be asked to undertake any other reasonable duties in connection with their post.

Job Descriptions are reviewed frequently and may be amended at any time in accordance with the needs of the local office. This job description does not form part of your contract of employment

Dated:

Signed:



Person specification

Knowledge

- A. Knowledge of the Welfare Benefits system and challenging benefits decisions. **E**
- B. Understanding of the processes involved in dealing with debt cases. **E**
- C. Knowledge of the different types of debt and the options available to people. **E**
- D. Understanding of financial education work and a basic knowledge of personal finance issues. **E**
- E. Awareness of the ways that life events can affect an individual's circumstances: banking, debt, benefits, credit and borrowing **E**
- F. Awareness of the holistic nature of financial capability guidance, and the many areas that are linked: ill health, employment status, bereavement, relationship breakdown **E**
- G. Understand the issues involved in interviewing clients. **E**
- H. Demonstrate understanding of social trends and their implications for clients and service provision. **D**
- I. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equal opportunities policies. **E**
- J. Demonstrate awareness of the issues facing Welfare Benefits and proposed Government changes. **E**

Abilities

- K. Effective oral communication skills. **E**
- L. Effective writing skills. **E**
- M. Ordered approach to work and an ability and willingness to follow and develop agreed procedures. **E**
- N. Numerate to the level required in the tasks. **E**
- O. Ability to prioritise own work, meet deadlines and manage caseload. **E**
- P. Ability to use IT in the provision of advice and the preparation of reports and submissions. **E**
- Q. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively. **E**
- R. Ability and willingness to work as part of a team. **E**
- S. Ability to monitor and maintain own standards. **E**

Experience

- T. Experience of making claims for Welfare Benefits. **D**
- U. Experience of liaising with the relevant Benefit authorities. **D**
- V. Experience of assisting clients with debt issues. **D**
- W. Experience of working with people with mental health issues, or people with disabilities. **D**
- X. Generalist advice work experience. **D**
- Y. Experience of establishing and developing partnerships with other agencies and joint working. **D**



Terms and conditions

1. SALARY

As advertised.

2. ANNUAL/TOTAL LEAVE

Annual leave is 28 days pro rata per annum, including statutory holidays, and runs from 1st April to 31st March.

3. PENSION SCHEME

Citizens Advice Swansea Neath Port Talbot provides a pension scheme. Further details of this scheme will be provided to the successful applicant at offer and contract stage.

4. LEARNING AND DEVELOPMENT

Citizens Advice Swansea Neath Port Talbot has a co-ordinated staff training and development strategy. This will mean that training for your current job, and future career developments relevant to Citizens Advice Swansea Neath Port Talbot will be provided and you will be encouraged to take an active role.

5. DISCLOSURE AND BARRING SERVICE (DBS)

A criminal record will not necessarily mean you are unsuitable for the role. Should there be any disclosures; a risk assessment will be carried out in line with the Witness Service criminal record check policy. If the risks are deemed to be too high or if Citizens Advice Swansea Neath Port Talbot is unable to secure insurance for you, employment may be terminated in line with Citizens Advice Swansea Neath Port Talbot's policy.

6. EQUITY, DIVERSITY & INCLUSION

Citizens Advice Swansea Neath Port Talbot recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable. Citizens Advice Swansea Neath Port Talbot will not discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, transgender, disability, nationality, national or ethnic origin, religion or belief, marital/partnership or family status, sexual orientation, age, social class, educational background, employment status,

working pattern, trade union membership or any other irrelevant factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other. All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles. Breaches of the policy may lead to disciplinary action.

7. DIGNITY AT WORK

Citizens Advice Swansea Neath Port Talbot is committed to providing a culture in which all staff value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

8. PROBATIONARY POLICY

New appointments are subject to a six months probationary period. Performance is reviewed after three months and again after six months.

9. LOCATION

As advertised.

10. FLEXIBILITY

Our roles are open to discussion about flexible working, which may include arrangements such as part-time working and job-sharing.

11. HOURS OF WORK

As advertised



What we give our staff

We value the people who work here - and we show that in what we offer. As well as things like annual leave and our workplace pension, working at Citizens Advice Swansea Neath Port Talbot means getting access to many benefits.

- **A commitment to your development.** We have a coordinated staff training and development strategy. This means that training will be provided both for your current job and for your development.



Equity, diversity & inclusion at Citizens Advice Swansea Neath Port Talbot

Citizens Advice Swansea Neath Port Talbot is fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

We judge the application, not the person. The selection panel won't see your personal details. This makes sure each person's response is judged on its merits and not on their background.