* **Job Title: Money Advice Caseworker**
* **Responsible to: Bureau Manager**

# About the role

Skye & Lochalsh Citizens Advice Bureau offer challenging opportunity for a part-time Money Advice Caseworker to join our highly successful team. A considerable knowledge of benefits, money advice and associated legislation is essential, as is excellent communication, training and interpersonal skills. You will provide a full range of debt advice and an opportunity to empower clients through face-to-face, telephone, and digital communication channels, acting for clients where necessary to provide positive outcomes.

The role will encompass providing information, advice and representation to our clients and supporting key professionals. The post will be based in CAB office in Portree, although the service may be delivered in various locations throughout Skye & Lochalsh. Current driving licence and access to a vehicle is desirable

# Job description

**Key responsibilities**

**Casework**

* Provide casework covering the full range of Money and Debt Advice
* Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
* Negotiate with third parties as appropriate.
* Ensure income maximisation through the take up of appropriate benefits.
* Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate (this can include effective referrals to CAB WR specialist)
* Assist clients with other related problems where they are an integral part of their case and refer to other advisers or specialist agencies as appropriate.
* Make home/outreach visits as necessary.
* Provide advice and assistance to other staff across the whole range of money advice issues.
* Ensure that all casework conforms to quality standards
* Maintain case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation.
* Ensure that all work conforms to the bureau's systems and procedures.

**Social policy**

* Assist with social policy work by providing information about clients' circumstances.
* 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.

**Professional development**

* Keep up to date with legislation, case law, policies and procedures relating to money advice and undertake appropriate training.
* Read relevant publications.
* Attend relevant internal and external meetings as agreed with the line manager.
* Prepare for and attend supervision sessions/team meetings/management team meetings as appropriate.
* Assist with Service initiatives for the improvement of services.

**Administration**

* Review and make recommendations for improvements to bureau services.
* Maintain local information systems.
* Use IT for statistical recording, record keeping and document production.
* Keep up to date with policies and procedures relevant to bureau work and undertake appropriate training.
* Attend internal and external meetings as agreed with the manager.
* Maintain close liaison with relevant external agencies.

**Public relations**

* Liaise with statutory and non-statutory organisations and represent the Service on outside bodies as appropriate.

**Other duties and responsibilities**

* Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
* Demonstrate commitment to the aims and policies of the service.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

*The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the bureau manager.*

# Person specification

**Knowledge, skills and experience**

**Essential**

* CURRENT Knowledge and experience of Money and Debt Advice
* Effective oral communication skills with particular emphasis on negotiating and representing.
* Effective writing skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
* Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
* Understand the issues involved in interviewing clients.
* Numerate to the level required in the tasks.
* Ability to prioritise own work, meet deadlines and manage caseload.
* Ability to use IT in the provision of advice and the preparation of reports and submissions.
* Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
* Ability and willingness to work as part of a team.
* Ability to monitor and maintain own standards.
* Demonstrate understanding of social trends and their implications for clients and service provision.
* Understanding of and commitment to the aims and principles of the CAB service and its equal opportunities policies.

**Desirable**

* Evidence of CAB training/qualification
* Experience of working with volunteers; in the voluntary sector as paid member or/and volunteer
* Experience of reporting to funders
* Case management/case recording experience

**Additional requirements**

* Possible travel involved in the post (outreach and home visits)
* Post subject to a Basic Disclosure check

**The Skye & Lochalsh Citizens Advice Bureau is committed to equal opportunities both in service provision and employment.**

**Charity number: SC022578**

**Charity name: Skye & Lochalsh Citizens Advice Bureau**