**Skye & Lochalsh Citizens Advice Bureau **

**Specialist Money Adviser and Caseworker**

**Job Description and Person Specification**

Context of role: Reporting to Money Advice Coordinator

Role purpose: To Provide Money Advice to clients

**Key work areas and tasks:**

**Casework**

* Provide casework covering the full range of Money Advice
* Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
* Negotiate with third parties as appropriate.
* Assist partner landlords with undertaking money management risk assessment matrixes and household census completions for clients included within active casework
* Ensure income maximisation through the take up of appropriate benefits.
* Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate.
* 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.
* Signpost to and assist clients with access to appropriate financial products where necessary
* Ensure that all casework conforms to the bureau's Office Manual and 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.
* Assist clients to connect with employability services
* Liaise with the Housing Options Officer

**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 and the Money Advice Coordinator.
* 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 work 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 CAB service.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

**Person specification**

* CURRENT Knowledge and experience of Money 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.

**Please Ensure**

**That on your application you show how you meet the requirements giving clear examples of casework management within an advice and advocacy setting.**