



Citizens Advice Taunton
St Mary's House
Magdalene Street
Taunton, TA1 1SB

tauntoncab.org.uk

Citizens Advice Taunton

Debt & Benefits Advisor

Role Description & Person Specification

July 2019

Context

The role will assist clients to manage their debt/money issues, mitigate the associated risks, maximise income and when possible deliver financial education to clients. This will help clients achieve outcomes such as sustaining tenancies and managing their own affairs, and will promote independent living which is particularly relevant for those who are socially excluded, vulnerable, young and those with complex needs.

Role Description

Advice delivery

- To provide a comprehensive debt and benefits advice service to clients who are experiencing difficulties, advising on their legal position and all the suitable options available through a mixture of face-to-face, telephone and digital interactions.
- Act for the client where necessary; drafting letters, negotiation, undertaking benefit calculations, obtaining medical evidence and researching rights/legislation as appropriate.
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation, using the IT software provided.
- Ensure income maximisation through the take up of appropriate benefits and/or debt management, identifying and advising on entitlement and overlap of other benefits.
- Prepare and present cases to the appropriate statutory bodies and to tribunal/court hearings as appropriate.
- Manage referrals and ongoing caseload to ensure clients receive appropriate and timely support.
- Ensure clients receive a fully integrated and client centred service at all times, coordinated with other projects/services.
- To keep up to date with trends and changes in debt and benefits legislation and best practice.
- Liaise and work with local statutory bodies, national representatives and other organisations as appropriate.
- Deliver financial capability learning activities as required.

Networking

- Develop and maintain local contacts with agencies and charities associated with debt and benefit issues and attend relevant external meetings.
- Act as a local ambassador service delivering briefings and demonstrations to increase usage of the service.
- Develop literature to promote projects and carry out other marketing activities such as

- assisting with press releases or delivering presentations.
- Contribute to the content of funding bids for projects.

Research & Campaigns and monitoring

- Assist with Research & Campaign work by providing information about clients' circumstances through the appropriate channel.
- Provide statistical information as required.

Other duties and responsibilities

- Establish and maintain effective and efficient administration systems.
- Participate fully in the life of the office attending workers' meetings, internal planning events, etc, as agreed with line manager.
- Abide by health and safety guidelines and share responsibility for own safety and that of your colleagues.
- Carry out any other appropriate tasks as requested by management, to ensure the effective delivery and development of the service.

Person specification

Essential

- Previous completion of the Citizens Advice advisor training or recognised training in advice work, e.g. Wiseradviser course, IAG Level 3 in Information, Advice and Guidance, including qualifications required by the FCA to provide debt advice
- Demonstrable experience of providing advice on debt and benefits issues.
- Knowledge & experience of all aspects of debt and benefits advice.
- Commitment to work towards Debt Relief Order Intermediary status.
- Ordered approach to casework.
- Excellent interpersonal, communication and presentation skills.
- Ability to collect, analyse and present project data and monitor progress against objectives.
- Experience of establishing and developing partnerships with other agencies and joint working.
- An ability and willingness to work both on own initiative and as part of a team.
- Ability to self-motivate and organise a diverse workload.
- Experience of working with IT packages, including Microsoft Office, case management systems and other bespoke software e.g. benefits calculator.
- Ability to use IT applications to record statistics, produce documents and training materials and keep accurate project records.
- Understanding of, and commitment to, the aims and principles of the CA service and its equal opportunities policies.
- Commitment, and track record of adhering, to the Data Protection Act, the requirements of the GDPR, and to client confidentiality.
- Access to a car and a valid driving license.

Desirable

- Certificate in Money Advice practice.
- Debt Relief Order Intermediary status.
- Representing clients at tribunals or in court.
- Experience of delivering capability services.

Terms and conditions for this role:

Location: Based at St Mary's House, Magdalene Street, Taunton, TA1 1SB, other locations in the area, and when necessary at other CA offices.

Hours: 15 hours per week.

Salary: £22,330 pa pro-rata

Appointments may be subject to a DBS check.