

Job Title:	<b>Money Advice Caseworker</b>
Responsible to:	Partnerships Manager
Grade & Salary:	SCP 19 – 25, £21,589 - £27,905 + 5% employer contribution to contributory pension scheme after qualifying period
Place of Work :	Talking Money’s Office, plus outreach locations in Bristol and the surrounding areas
Probationary Period:	Three months

**This position is subject to DBS clearance.**

### **Main Purpose of Job**

**The delivery of specialist money advice and casework, contributing to Talking Money’s wider mission of empowering and enabling people to tackle financial challenges through advice, financial education and support. We encourage collaborative working across roles to problem solve and expediate better outcomes for clients.**

### **Responsibilities**

- 1 To deliver specialist debt advice for clients in debt face-to-face, over the phone or online.
- 2 To provide negotiation, advocacy and support for clients where appropriate (e.g. with creditors, at court hearings etc).
- 3 Provide income maximisation and/or financial capability support to clients as linked to their debt advice.
- 4 To promote service user empowerment, focusing on people’s capabilities rather than problems and needs, through information and support to use self-help where possible.
- 5 Provide an integrated money advice service by actively working alongside and promoting Talking Money’s other services and use referral networks for help and support in other areas of legal help.
- 6 To participate in the delivery of office and outreach based advice including home visits where required.
- 7 To maintain full and accurate case records and statistical monitoring and evaluation information, using agreed methods, process and software systems.
- 8 To understand and meet the requirements of a variety of funding contracts including the Money and Pensions Service.

- 9 To provide individual or group supervision for students and/or volunteers where capacity permits, with support from the leadership team and wider staff team.
- 10 To attend appropriate training courses and conferences, keeping up to date with relevant legislation, policies and practice; meeting and maintaining the required number of CPD points each year. This may include developing a specific area of expertise and acting as a resource for the wider staff team.
- 11 To represent Talking Money at appropriate forums and meetings, liaising with partner agencies and other service providers in the area.
- 12 To contribute to (or lead on) specific tasks eg:
  - delivering training sessions on debt advice
  - running financial capability or income maximisation workshops for service users or client-facing workers
- 13 To work at all times within Talking Money's policies and procedures, including those within the Staff Handbook, and supporting documentation.
- 14 To undertake other reasonable tasks as required to ensure compliance with funding agreements/contracts and to assist in the running of the service.

### Money Advice Caseworker - Person Specification

		Essential	Desirable
<b>Knowledge and understanding</b>	<ul style="list-style-type: none"> <li>• Specialist up to date knowledge of debt advice solutions and categorisation of debts (ie, priority and non-priority)</li> <li>• Up to date knowledge of a range of welfare benefits including Universal Credit, Housing Benefit, Council Tax Relief, Tax Credits, Employment Support Allowance, Job Seekers Allowance and Income Support</li> <li>• Understanding of the individual and social context of the lives of our typical clients</li> <li>• Knowledge of systems thinking concepts</li> </ul>	 X  X  X	   X
<b>Skills and abilities</b>	<ul style="list-style-type: none"> <li>• Excellent written and verbal communication skills, with the ability to liaise effectively and positively with a wide range of individuals and organisations</li> <li>• Qualified Debt Relief Order Intermediary</li> <li>• Ability to work with clients on spending habits diplomatically and supportively</li> <li>• Able to work under pressure, on own initiative, prioritising and managing own workload to meet deadlines and funder targets</li> </ul>	 X  X  X	
<b>Experience</b>	<ul style="list-style-type: none"> <li>• Experience of helping people with debt problems at a specialist level</li> <li>• Experience of working under a Money and Pensions Service funding contract</li> <li>• Experience of working to effect systems change</li> <li>• Experience of reflective practice</li> <li>• Experience of co-working cases</li> </ul>	 X	  X  X  X
<b>Other</b>	<ul style="list-style-type: none"> <li>• Access to transport with business use insurance cover and a willingness to travel locally, regionally and nationally as required</li> </ul>	 X	