

# Trainee Money Adviser/Money Adviser

## April 2021

**Job pack** : Thank you for your interest in working at Citizens Advice Sherwood and Newark. This job pack should give you everything you need to know to apply for this role and what it means to work within the Citizens Advice network.

In this pack you'll find:

- Our values
- 3 things you should know about Citizens Advice
- Information about the organisation and role
- Application process
- The role profile and person specification
- Guidance Notes

## ● Our values



**Sherwood  
& Newark**

**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.



## **3 things you should know about Citizens Advice**

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in over 290 independent local Citizens Advice services across England and Wales.

**2. 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.

**3. 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.

## **How Citizens Advice Sherwood & Newark works**

Citizens Advice Sherwood & Newark is a registered charity providing advice services in our 2 town centre offices in Newark and Ollerton. We have been operating for over 43 years.



**Sherwood  
& Newark**

In 2019/20 we handled over 20,000 enquiries on a wide range of subjects including debt, housing and homelessness, family problems and employment issues. Debt and welfare benefits account for almost 74% of all enquiries.

Our service makes a real contribution to the most deprived individuals and communities and we make a real difference to people's lives.

We support local economies by maximising people's income and increase the circulation of money in the local area by helping people claim benefits they are entitled to.

Citizens Advice Sherwood & Newark works in partnership with local service providers in the voluntary and statutory sectors and provides advice services within the community targeting our service towards people most likely to be socially excluded.

Our Trustee Board is responsible for setting the strategy and budget for the organisation.

Day to day responsibility for the running of the organisation is with the Chief Officer together with a management team.

We employ specialists in the field of money advice, who work in the local community supported by our volunteer advisors. Currently we have 11 paid staff and 34 volunteers across the two offices.

This is a challenging, exciting and innovative opportunity to join a successful forward thinking local Charity and to be part of a professional team of both staff and volunteers.



## **How Citizens Advice works**

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

The national charity includes

- 800 national staff working in one of our 6 offices or as homeworkers, or as part of the Witness Service from over 240 courts across England and Wales
- 3000 Witness Service volunteers

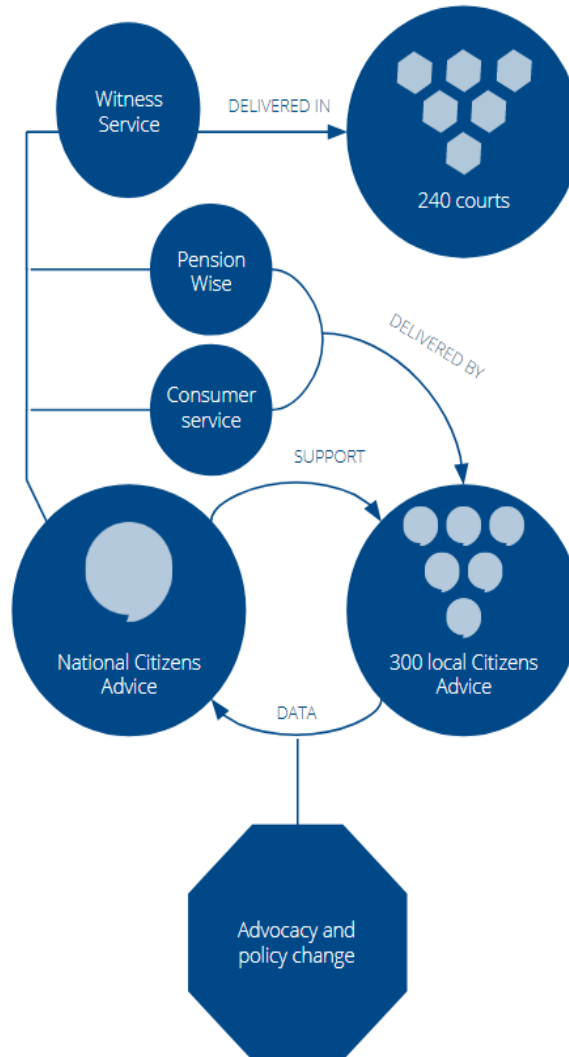
We are a network of members, all independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.





## Application Process

The closing date for completed applications is 10am on Wednesday 5th May 2021

Interviews will be held on Wednesday 12th May 2021

It is not mandatory to complete the equalities and diversity monitoring form. This information is requested for monitoring purposes only in line with the service's commitment to equality and diversity.

Please email your completed application to:-

[jackieinsley@sn-ca.org.uk](mailto:jackieinsley@sn-ca.org.uk)

If you are unable to make an electronic application via email, please contact Jackie Insley on [jackieinsley@sn-ca.org.uk](mailto:jackieinsley@sn-ca.org.uk)

A Disclosure and Barring Service (DBS) check will be required for this role

**CVs are not acceptable. No agencies**



## The Role

<b>Job Title:</b>	Trainee Money Adviser/Money Adviser
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<b>Reporting to:</b>	Money Advice Team Leader
<b>Salary:</b>	£18,562 per annum (plus 6% pension contribution) - rising to £23,080 on completion of training or proven experience
<b>Hours:</b>	37 hours per week
<b>Location:</b>	Newark & Sherwood, Nottinghamshire (our two main offices are in Newark and Ollerton). Frequent travel across the District and occasionally County. Home visiting across the Newark & Sherwood District (Travel expenses will be paid)
<b>Contract:</b>	Fixed term End date of contract: 31 March 2024 (renewal subject to funding)
<b>Role purpose:</b>	Undertake appropriate training to meet Financial Conduct Authority (FCA) standards for the delivery of high quality debt advice. Trainee: To undertake and complete Money Advice Caseworker training as directed. Within three months to be actively advising and assisting clients and managing a caseload to FCA standards
<b>Context of role:</b>	You will be a member of Citizens Advice Sherwood & Newark Money Advice team. As such you will be required to work from any Citizens Advice outlet and outreach venue and report to your line manager who will usually be the Money Advice Team Leader.  Part of this role will be to support individuals and families in a home environment.
<b>Key accountabilities</b>	<b>Key elements/Tasks</b>



<p><b>Casework :</b></p>	<p><b>Training</b></p> <ul style="list-style-type: none"><li>● To undertake and complete Citizens Advice generalist advice training (unless you hold the Citizens Advice Training Certificate or equivalent)</li><li>● To undertake training to become a qualified Money Advice Case Worker</li><li>● To undertake and complete ongoing Money Advice Caseworker training as directed and to FCA standards.</li><li>● Within three months to be actively advising and assisting clients and managing a caseload of debt clients and meeting agreed client number targets.</li><li>● The postholder will need to be able and willing to train to become an authorised Debt Relief Order Intermediary.</li></ul> <p><b>Casework and advice support</b></p> <ul style="list-style-type: none"><li>● Provide casework and other support covering the full range of debt and money advice by: face to face; telephone; in a home environment and electronic media as appropriate.</li><li>● Work with, and support, other staff and volunteers in the delivery of Citizens Advice Sherwood &amp; Newark’s money advice services.</li><li>● Act for the client where necessary, drafting letters, budgets and financial statements and carrying out any calculations as appropriate.</li><li>● Negotiate with third parties as appropriate.</li><li>● Ensure income maximisation for clients through the take up of appropriate welfare benefits.</li><li>● Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate.</li><li>● 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</li><li>● Ensure that all casework conforms to the relevant Citizens Advice Quality Mark Standards and FCA standards.</li><li>● Maintain electronic and paper case records for the purpose of continuity of casework,</li></ul>
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	<ul style="list-style-type: none"><li>● Information retrieval, statistical monitoring, and report preparation.</li></ul>
<b>Research and Campaigns.</b>	<ul style="list-style-type: none"><li>● Assist with research and campaigning work by providing information about clients' circumstances.</li><li>● Provide statistical information e.g. on the number of clients and nature of cases, and provide regular reports to the management team.</li><li>● Monitor service provision to ensure that it reaches the widest possible client group.</li><li>● Alert other staff to local and national issues</li></ul>
<b>Professional development.</b>	<ul style="list-style-type: none"><li>● Participate in the Trainee Money Adviser programme in order to achieve the required standard</li><li>● Keep up to date with Welfare Reform changes and how these may relate to the client group being served</li><li>● Keep up to date with legislation, case law, policies and procedures relating to Debt and Money Advice and other service related work and undertake appropriate training.</li><li>● Read relevant publications.</li><li>● Prepare for and attend supervision sessions/team meetings/management team meetings/external meetings as agreed with the Line Manager.</li><li>● To attend training and development courses as required and as agreed with the line manager</li><li>● Assist with initiatives for the improvement of services.</li></ul>
<b>Administration &amp; IT</b>	<ul style="list-style-type: none"><li>● Record and maintain client records and case information in line with data protection legislation, Citizens Advice policy and procedures and our quality standard mark</li><li>● Assist with the maintenance of Office information systems.</li><li>● Use IT for statistical recording, record keeping and document production and provide regular reports of the work undertaken or needed.</li><li>● Organise and maintain electronic diary systems</li><li>● Produce clear and concise reports, applications and letters as required</li><li>● Keep up to date with policies and procedures relevant to the service and undertake appropriate training</li><li>● Adhere to Data Protection policies</li></ul>





	<ul style="list-style-type: none"><li>● Digital Awareness</li><li>● Maintain close liaison with relevant external agencies.</li></ul>
<b>Public relations.</b>	<ul style="list-style-type: none"><li>● Assist with the delivery of Citizens Advice Sherwood &amp; Newark Publicity strategy.</li><li>● Assist with the development of initiatives to promote good money management skills and avoidance of debt.</li><li>● Liaise with statutory and non-statutory organisations and represent the Service on outside bodies as appropriate.</li></ul>
<b>Other duties and responsibilities.</b>	<ul style="list-style-type: none"><li>● Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the whole service.</li><li>● Demonstrate commitment to the aims and principles of the Citizens Advice service.</li><li>● Abide by safety, health and environment guidelines and share responsibility for your own safety and that of colleagues.</li></ul>



## Person Specification

	<b>Criteria</b>	<b>Essential</b>	<b>Desirable</b>	<b>Demonstrable through application/interview/ Test</b>
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1	A minimum of one year's experience of advice work and/ or previous client facing experience.	✓		
2	Experience, knowledge or understanding of debt advice or a willingness to undergo training in this area.	✓		
3	Experience, knowledge or understanding of Universal Credit and Welfare Benefits or a willingness to undergo training in this area.	✓		
4	Experience, knowledge or understanding of budgeting, financial capability and income maximisation work or a willingness to undergo training in this area.	✓		
5	Experience and/ or an understanding of the issues involved in interviewing and supporting clients.	✓		
6	The ability to communicate effectively and sensitively with clients and other parties, excellent negotiation skills are required.	✓		
7	Good writing skills with the ability to draft letters and reports.	✓		
8	Experience of working and liaising with external agencies.	✓		



<b>9</b>	Good numeracy skills with the ability to carry out efficient calculations and prepare budgets for clients - at least GCSE D / Level 3 equivalent and/ or relevant experience to support this.	✓		
<b>10</b>	An ordered approach to work and willingness to follow and develop agreed procedures.	✓		
<b>11</b>	Ability to analyse and interpret complex information.	✓		
<b>12</b>	Experience or willingness to develop skills in relation to prioritising own work, meeting deadlines and managing a caseload.	✓		
<b>13</b>	Flexible approach and willingness to work as part of a team with both paid staff & volunteers.	✓		
<b>14</b>	The ability to effectively use IT software in the provision of advice and maintenance of case records, and the preparation of statistical reports and submissions.	✓		
<b>15</b>	An understanding and commitment to work within the Aims and Principles of the CAB	✓		



	service and its Equal Opportunities policies.			
<b>16</b>	Be willing to travel and have access to own transport	✓		
<b>17</b>	Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.		✓	
<b>18</b>	Proven track record in achieving targets within a challenging environment and work within a target culture.		✓	
<b>18</b>	Qualified as a Citizens Advice Generalist Adviser.		✓	
<b>20</b>	Understanding of the issues affecting society, including social trends and their implications for clients and service provision.		✓	
<b>21</b>	Knowledge of quality of advice standards and FCA standards.		✓	
<b>22</b>	General knowledge of services and provisions available within the Newark & Sherwood District.		✓	
<b>23</b>	Experience of supporting people in a home environment		✓	

## **Application Form Guidance Notes**

Please complete your application and return it preferably by email (as a Word document) no later than the closing date referred to in the advert. If you return your application via email there is no requirement to send a hard copy in the post. You can alternatively post a copy to the address given. CVs will not be accepted as a substitute for the application form.

The application form plays a key part in our recruitment and selection process. We use the information you provide about your skills, experience, career and education history to decide whether or not to invite you for an interview. It is important that you complete the application form as fully and accurately as possible, ensuring that you give specific examples which demonstrate how you meet the essential and desirable criteria for the role for which you are applying.

### **Disability**

Please let us know if you require any adjustments to be made to the application process or would like to provide any information you wish us to take into account when we are considering your application. If you are selected for an interview, we will ask you to let us know if you have any access needs or may require reasonable adjustments to the interview or assessment (if applicable) at that stage. Please be assured that we will be supportive in discussing reasonable adjustments with you at any stage of the recruitment and selection process.

### **Entitlement to work in the UK**

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 1996. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made.

Please note that Citizens Advice Sherwood & Newark does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

### **Diversity Monitoring**

Citizens Advice Sherwood & Newark values diversity and promotes equality. We encourage and welcome applications from suitably skilled candidates from all backgrounds. Monitoring recruitment and selection procedures is one way of helping us to ensure that there is no unfair discrimination in the way that we recruit people. To do this we need to know about the diversity profile of people who apply for posts at Citizens Advice Sherwood & Newark. This information is given in confidence for monitoring purposes only and is not seen by anyone responsible for making recruitment decisions. However, if you would prefer not to answer any of the questions we ask, please leave them blank.

### **Information, experience, knowledge, skills and abilities**

This is a key section of the application form which allows you to provide evidence of your experience, knowledge, skills and abilities that are relevant to the role as described in the role profile. Selection is

based on an assessment of the evidence you provide against the requirements of the role as set out in the person specification. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities.

Please provide one example for each requirement. You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it and the outcome or result of your actions. Please try to limit your response to each criterion to a maximum of 200 words.

A useful guide might be S.T.A.R:

- **Specific** – give a specific example
- **Task** – briefly describe the task/objective/problem
- **Action** – tell us what you did
- **Results** – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family or home responsibilities, can also be given.

**Shortlisting outcomes** - Shortlisted applicants will be invited for an interview. Some positions may require additional assessments (practical task/test or assessment centre). If this is the case, further details will be provided if you are shortlisted.

**References** - All job offers are subject to the receipt of two satisfactory references: One should be from your current or most recent employer or line manager (if you are employed through an agency), or your course tutor if you have just left full time education. The other should be someone who knows you in a work related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the role. References will only be taken up for successful candidates following the interview.

**Criminal convictions** - Anyone who applies to work within Citizens Advice Sherwood & Newark will be asked to disclose details of unspent convictions during the recruitment process.

Having a criminal record will not necessarily bar you from working for Citizens Advice Sherwood & Newark – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, we are not able to employ anyone with a conviction for a sexual offence against a child or vulnerable adult, regardless of when the offence took place. All other convictions will be considered on an individual basis.

A Disclosure and Barring Service (DBS) checks are only requested where proportionate and relevant to the post concerned. If the post for which you are applying for requires a DBS Disclosure, this will be noted in the application pack.