



Thank you for your interest in working at Citizens Advice Mid Mercia. The following information should give you all that you need to apply for this role.

<b>Job Title;</b>	Money Advice Caseworker
<b>Salary;</b>	<b>£23,810 - £24,822</b> (for trainee) <b>or £24,822 - £27,000</b> (trained caseworker)
<b>Hours of work;</b>	37.5 hours per week
<b>Responsible to;</b>	Financial Support Lead - Citizens Advice Mid Mercia
<b>Location;</b>	Hybrid Working – min of 2 days working from our Outreach Venue in and around Stratford upon Avon area CV37 The role also requires travel to our Offices for face-to-face team meetings max of every 1/4 (expenses paid in accordance to our travel policy)
<b>Start Date;</b>	To be Agreed

### The Service Aim

Orbit, being the UK's largest developer of affordable housing, believes that everyone is entitled to a good quality, safe and affordable home and currently manage 46,500 affordable and social rent homes across the Midlands, South and East of the UK. They support over 100,000 customers in differing stages of life, from those seeking their first home to customers looking for enhanced supported living.

For over 50 years they have been a force for positive change; leading in building thriving communities and believing that everyone is entitled to a good quality home that they can afford, in a place that they are proud to live.

Their Better Days programme helps thousands of Orbit customers every year through managing their money, trying something new, finding happiness with work or improving their digital skills and overall wellbeing.

They aim to:

- Provide good quality and energy efficient homes keeping running costs to a minimum
- Ensure rent or service charge costs are fair and value for money
- Empower our customers to be in control of their finances and wellbeing
- Ensure customers have the skills to maintain and sustain their income and expenditure.

Working closely in partnership with Orbit, we aim to deliver a financial inclusion service for 2 years, exclusively to Orbit residents as part of their Orbit's Better Days programme, providing money advice, income maximisation and budgeting advice across three regions of the midlands, east and south-east of England.

The service will be open to all Orbit customers:

***Independent Living over 55s,  
customers housed with support,  
customers in rent arrears,***

CAMM – Financial Inclusion Programme – Orbit (Money Advice Caseworker)

*customers via the community,  
shared owners.*

Customers will be able to access the service 5 days a week with multiple access points into the service irrespective of geography (phone / email / online / referral form) Face to face services, including home visits will be offered for customers with additional support needs.

### **The Role**

We are seeking to recruit a Money Advice Caseworker for our Financial Inclusion Programme to focus on supporting Orbit customers exclusively with:

- 1. Money / debt advice with income maximisation**
- 2. Welfare benefits advice and take-up work**
- 3. Energy Advice and Support**

Case work is expected to help navigate and guide the customer through a full journey of dealing with urgent issues, developing and maintaining a budget, maximising their incomes and helping to reduce their expenditure. There is an expectation to **support at least 2 customers each day**.

### **Service Delivery**

- ✓ Provide a debt advice service with casework support for Orbit customers to help reduce financial exclusion.
- ✓ Ensure that all casework conforms to the organisations Advice Quality Standard and/or the Specialist Quality Mark as appropriate.
- ✓ Work in partnership with Orbit staff for effective and efficient referrals and service delivery.
- ✓ Maintain case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation.
- ✓ Complete detailed financial statement and budgeting advice.
- ✓ Review income and make applications for benefits and grants as required.
- ✓ Negotiate debt repayment plans with creditors and carry out benefit appeals as necessary.
- ✓ Deal with emergencies such as debt collection bailiff action and advise on insolvency options
- ✓ Prepare and present cases to the appropriate statutory bodies, tribunals, and courts.
- ✓ Forward referrals back into additional support services available through Orbit and/or community assets.
- ✓ Follow-up outcome reporting providing evidence of impact.
- ✓ Negotiating by letter, telephone or in person, with all the agencies that affect the client requiring money advice, e.g., fuel companies, local authorities, government departments, consumer credit companies etc.
- ✓ Keep accurate case records and orderly and secure case files.

### **Professional development**

- ✓ Keep up to date with legislation, case law, policies and procedures relating to financial inclusion, and attend appropriate training; including reading relevant publications
- ✓ Attend meetings, supervision and training as required by line manager

### **General**

- ✓ Comply with all the organisation's published policies and procedures; Health and Safety, Confidentiality, and Equal Opportunities.
- ✓ Comply with organisational, statutory and legislative requirements
- ✓ Maintain regular contact with voluntary and statutory agencies.
- ✓ Undertake other such duties as may be required to ensure the effective delivery and development of the service
- ✓ Promote the aims, principles and membership requirements of the CAMM Services

## PERSON SPECIFICATION – Money Advice Caseworker

### Essential

- Ability to plan, prioritise own work, meet deadlines and manage caseload remotely
- Ability to work to targets and KPI's
- Effective written and oral communication skills with particular emphasis on negotiations
- Understand the issues involved in interviewing vulnerable clients.
- Ability to research, analyse and interpret complex information
- Proven ability to work remotely and attend an office location every ¼ for service development and team building
- Numerically competent and able to advise and support individuals in assessing their financial situation
- Understand and empathise with the aims and principles of the Citizens Advice Mid Mercia and its various policies.
- Ability to use IT in the provision of advice
- Previous experience of delivering Money Advice / Budgeting / Income maximisation
- In possession of a full driving licence and use of a car

### Desirable

- Previous experience of delivering advice under the Citizens Advice quality framework (generalist adviser) and hold the Citizens Advice's nationally recognised Adviser Learning Programme certificate
- Energy Advice Trained

## Overview of Citizens Advice Mid Mercia Citizens

Advice Mid Mercia is an independent member of the Citizens Advice network, which is made up of the national charity and a network of local Citizens Advice members.

Citizens Advice Mid Mercia delivers free, impartial, independent and confidential advice, training, peer support and advocacy services. Services are delivered across South Derbyshire, Derby City, East Staffordshire (Burton-upon-Trent and Uttoxeter) and Tamworth.

Citizens Advice Mid Mercia has over 78 members of staff and many volunteers delivering services from four main offices and community venues.

Our CORE values.

- ✓ **Communicate:** We will be consistent, positive, passionate, and listen.
- ✓ **Ownership:** We will be accountable, make a difference, meet deadlines, keep promises and have solutions.
- ✓ **Respect:** We will be honest, work with integrity, trust each other, be fair, tolerant and stand for equality.
- ✓ **Effective:** We will deliver quality, focus on detail and be professional.

**Probation Period:** 9 months – with possible extension if performance review is required.

**Benefits:** 28 days annual leave plus bank holidays pro rata. Up to 5% pension contribution, access to 24/7 counselling service.

**Positive Employment:** We welcome applications from people with disabilities and a variety of backgrounds. In accordance with Citizens Advice national policy, the successful candidate will be screened by the DBS.

**Want to chat about this role?** If you want to chat about the role further, you can contact:

- Emma Herron (Financial Support Lead) 07889087514
- Elizabeth Holt (Development Manager) 07814 918993
- Visit our website for an application pack - <https://www.citizensadvicemidmercia.org.uk/vacancies/>