

# Job Opportunity: Money Adviser x2 (trainee roles available)

citizens  
advice

Derbyshire  
Districts

## Role 1: 37 hours per week

Telephone based with some travel throughout Derbyshire  
Fixed term contract to June 2023

## Role 2: 37 hours per week

Locally funded, based in Matlock with some travel in Derbyshire Dales  
Fixed term contract to March 2023 with a possibility of extension

**Salary: £22,820 to £25,038 per annum dependent on experience**

Would you like to help people become free of debt and money worries? Why not consider joining our friendly Money Advice team which provides a vital money advice service to clients.

The ideal candidate will have excellent money advice skills, some knowledge of the current benefits system, and an up-to-date knowledge and understanding of welfare reform. Previous money advice work is desirable but not essential as full training will be provided along with an opportunity to complete the Accredited Money Advice Learning Plan. Good communication skills, both written and verbal are essential, as is the ability to effectively communicate with our customers with a non-judgemental approach.

### Terms and conditions

**Annual leave:** 35 days annual leave per year, including Bank Holidays and four days Christmas Shutdown. Additionally, there is a long service leave of 1-5 days after 4-8 years' service. We also offer an annual leave purchasing/selling scheme.

**Pension:** Auto enrolment into an approved pension scheme. 6% contribution by the organisation, 2% contribution from staff member.

**Sick pay:** 3 months full pay and 3 months half pay (dependant on length of service).

**Other benefits:** Employee assistance programme, including perks

---

At Citizens Advice Derbyshire Districts we provide free, confidential, impartial and independent advice and information on a wide range of subjects. We value diversity, promote equality and challenge discrimination. We encourage and welcome applications from people of all backgrounds.

The successful candidate will be required to undertake a Disclosure and Barring Service check. The possession of a criminal record will not necessarily prevent an applicant from obtaining this post, as all cases are judged individually according to the nature of the role and the background and circumstances of your offence. Please get in touch to see our policy on DBS checks.

**To view and download the recruitment pack visit:**  
[www.citizensadviceDerbyshireDistricts.org.uk/get-involved/join-our-team/](http://www.citizensadviceDerbyshireDistricts.org.uk/get-involved/join-our-team/)  
Please complete and return the application form to [hr@ddcab.org.uk](mailto:hr@ddcab.org.uk)

**Closing date: 9am, Monday 11 July 2022**  
**Interviews: w/c 11 July 2022**



**Derbyshire  
Districts**

# Money Adviser x2

**(trainee roles available)**

## Information pack

Thanks for your interest in working at Citizens Advice Derbyshire Districts. This information pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice Derbyshire Districts
- The role profile and personal specification
- Terms and conditions
- What we give our staff
- Guidance notes for completing the application

### **Want to chat about this role?**

If you want to chat about the role further, you can contact [hr@ddcab.org.uk](mailto:hr@ddcab.org.uk) to setup a phone call with the service manager

**Completed applications to be sent to [hr@ddcab.org.uk](mailto:hr@ddcab.org.uk)**

**Closing date: 9am, Monday 11 July 2022**

**Interviews: w/c 11 July 2022**

# Our values

**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 us

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in around 300 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 Derbyshire Districts works

Derbyshire Districts operates across four Local Authority areas in Derbyshire (Amber Valley, Derbyshire Dales, Erewash and High Peak). We are a large and progressive organisation with seven offices spread throughout the districts. Our main office locations are Buxton, Ilkeston and Matlock. We are an independently funded charity receiving a number of different grants and contracts to fund our work.

Derbyshire Districts currently has a staff population of approximately 70 individuals and volunteer team of 150. The organisation is managed by the Chief Officer with a team of two senior operations managers, a finance manager and a team of service managers.

Derbyshire Districts is a large organisation in Derbyshire with an average income of approximately £2.5 million.

# Overview of Citizens Advice

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

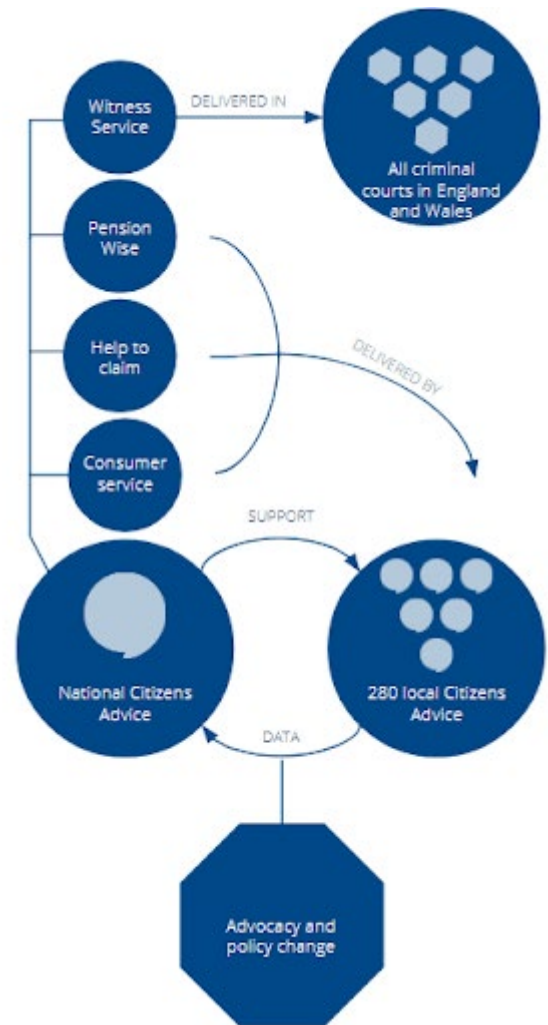
This role sits our network of independent charities, delivering services from

- 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.





# The role: Money Adviser

**Reports to:** Projects and Services Manager

**Purpose of the job:** To provide a money advice service to clients and to act as a money advice resource for other Citizens Advice staff.

## 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.
- Ensure income maximisation through the take up of appropriate [specialism] 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 [specialism] issues.
- Ensure that all casework conforms to the organisation's Office Manual, the Citizens Advice Quality standard and the debt advice audit process.
- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Ensure that all work conforms to the bureau's systems and procedures.

## 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.
- 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 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.
- Achieve 18 CPD points per year.

## Administration

- Review and make recommendations for improvements to bureau services.
- 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 Citizens Advice service.
- To support and monitor the wellbeing of staff within the organisation and to contribute to maintaining a healthy balanced workforce.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

This job description is not exhaustive or exclusive. It is intended as an outline of the areas of activity and will be amended considering the changing needs of the organisation.



## **Person specification**

1. Knowledge and experience of money advice and welfare benefits.
2. Effective oral communication skills with particular emphasis on negotiating and representing.
3. Effective writing skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
4. Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
5. Understand the issues involved in interviewing clients.
6. Numerate to the level required in the tasks.
7. Ability to prioritise own work, meet deadlines and manage caseload.
8. Ability to use IT in the provision of advice and the preparation of reports and submissions.
9. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
10. Ability and willingness to work as part of a team.
11. Ability to monitor and maintain own standards.
12. Demonstrate understanding of social trends and their implications for clients and service provision.
13. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equality and diversity policies.



# Terms and conditions

**Role 1:** 37 hours per week

Telephone based with some travel throughout Derbyshire

Fixed term contract to June 2023

**Role 2:** 37 hours per week

Locally funded, based in Matlock with some travel in Derbyshire Dales

Fixed term contract to March 2023 with a possibility of extension

**Salary:** £22,820 to £25,038 per annum dependent on experience

**Annual leave:** 35 days annual leave per year, including Bank Holidays and four days Christmas Shutdown. Additionally, there is a long service leave of 1-5 days after 4-8 years' service. We also offer an annual leave purchasing/selling scheme.

**Pension:** Auto enrolment into an approved pension scheme. 6% contribution by the organisation, 2% contribution from staff member.

**Sick pay:** 3 months full pay and 3 months half pay (dependant on length of service).

**Other benefits:** employee assistance programme, including perks

In accordance with Citizens Advice policy the successful candidate will require a DBS check. However, a criminal record will not necessarily be a bar to your being able to take up the job.



## What we give our staff

We value the people who work here - and we show that in what we offer. As well as things like annual leave and our workplace pension, working at Citizens Advice means getting access to many benefits.

- **A commitment to your development.** We have a coordinated staff training and development strategy. This means that training will be provided both for your current job and for your development.
- **Employee assistance programme.** Everyone working at Citizens Advice has immediate access to professional and completely confidential counselling and legal advisory services.
- **Support when things in your life change.** We'll be there for you with options for flexible working, career breaks, and support for parents and carers.



## Guidance notes for applicants

### Application form

The form should be completed in black ink, black ballpoint pen or typed. Return the form by post or email. If you return the form by email, there is no requirement to send a hard copy in



the post. CVs will not be accepted as a substitute for the application form, unless specifically stated in the advert.

### **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 consider when we are considering your application. If you are selected for 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 we do not hold a sponsor licence and therefore cannot issue certificates of sponsorship under the points-based system.

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

The person specification lists the minimum requirements for this post. When shortlisting for interview the selection panel will only consider the information contained in your application form and will assess this against the person specification.

The selection panel cannot make assumptions about the nature of the work you have done or your experience from a list of job titles. It is therefore important that you use the space provided to demonstrate how you meet the requirements. Paid and voluntary work are not the only experiences worth quoting. Other life experiences and skills may be just as valid.

If you are shortlisted for interview, the selection panel will ask you questions based on the person specification which will cover the areas in more detail.

### **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 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 interview.

### **Criminal convictions**

Anyone who applies to work within Citizens Advice Derbyshire Districts 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 us – 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. Please get in touch to see our policy on criminal background checks.