



**Derbyshire  
Districts**

# Money Adviser

**37 hours per week**

## 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 form

### **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 a service manager.

**To view the recruitment pack and download the application form visit:**

**<https://www.citizensadvisederbyshiredistricts.org.uk/vacancies/>**

**Please send a CV with a completed application form to: [HR@ddcab.org.uk](mailto:HR@ddcab.org.uk)**

**Closing date for applications:** Rolling – applications will be considered when they are received.

**Interview date:** To be confirmed

# 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 five Local Authority areas in Derbyshire (Amber Valley, Chesterfield, 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, Chesterfield, 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 100 individuals and volunteer team of over 60. 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.

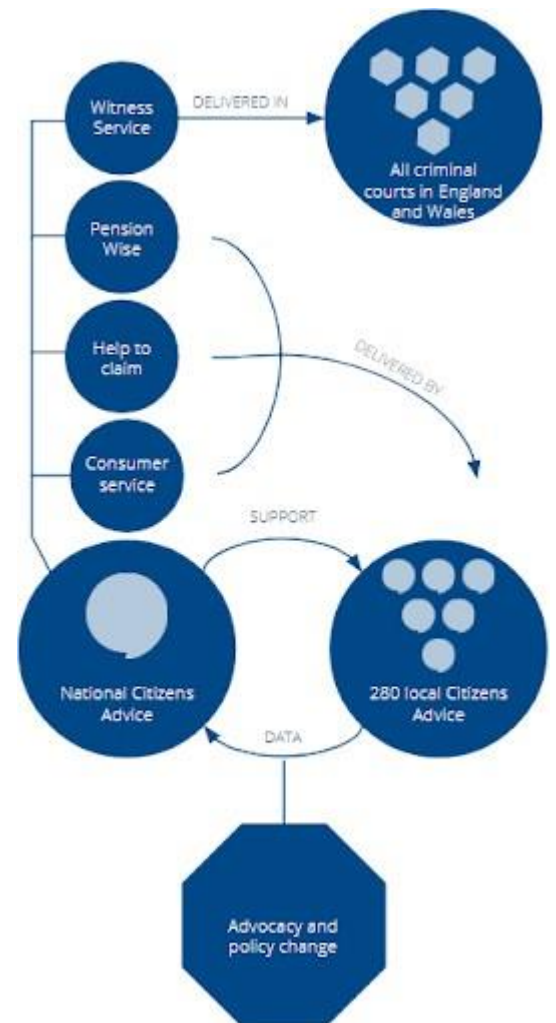
This role sits our network of independent charities, delivering services from

- 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.



## 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.



# The role: Money Adviser

**Team:** Money Advice

**Reports to:** Advice Service Manager

**Purpose of the Job:** To provide essential administrative support to the Money Advice team and the associated Advice Service Manager.

## Main Responsibilities

### Advice and Casework

- Provide high-quality advice and casework across the full range of money advice issues.
- Act on behalf of clients by negotiating with creditors, drafting correspondence, and making telephone calls.
- Liaise with third parties such as creditors, landlords, and statutory bodies as appropriate.
- Maximise clients' income by identifying and supporting claims for relevant benefits.
- Prepare and present cases to appropriate statutory bodies, tribunals, and courts, where required.
- Address related client issues when integral to the money advice case, referring on to other advisers or specialist agencies when appropriate.
- Offer a multi-channel approach including face to face, telephone, email, webchat and where necessary outreach or home visits.
- Offer expert advice and support to other staff across the full spectrum of money advice topics.
- Ensure all advice and casework adheres to Citizens Advice quality standards, the organisation's policies, MaPS standards and any other relevant quality standards.
- Maintain accurate and up-to-date case records for continuity, information retrieval, monitoring, and reporting purposes.
- Follow all internal systems and procedures in line with the organisations policies.
- Ensure any project KPIs are met, including client volumes and quality of advice.

### Social Policy

- Support social policy work by identifying issues arising from client cases.
- Provide statistical and narrative information on the number and nature of cases to management.
- Contribute to the creation of detailed case studies for impact monitoring.
- Alert colleagues to relevant local and national issues affecting clients.

### Professional Development

- Stay up to date with changes in legislation, case law, policies, and procedures relating to money advice, and undertake relevant training.
- Engage in self-directed learning, including reading relevant publications.
- Attend internal and external meetings as agreed with the line manager.
- Participate in supervision, team meetings and management meetings, as appropriate.
- Contribute to service development initiatives.
- Achieve a minimum of 16 Continuing Professional Development (CPD) points per year.

## Administration

- Review and suggest improvements to service delivery and operational procedures.
- Use IT systems for case recording, statistical reporting, and document production.
- Maintain an up-to-date understanding of internal policies and procedures.
- Develop and maintain effective working relationships with relevant external agencies.
- Represent the service at meetings with statutory and non-statutory partners as required.

## Other Duties and Responsibilities

- Carry out other tasks that may be reasonably required to ensure the effective delivery and development of the service.
- Uphold the aims and principles of the Citizens Advice service, including its commitment to equity, diversity and inclusion.
- Support staff wellbeing and help to maintain a balanced and healthy working environment.
- Comply with all health and safety guidelines and take shared responsibility for personal and team safety.
- Identify and address personal learning needs in line with professional development goals.
- Work within all organisational policies and procedures.

## Teamwork and Relationships

- Maintain positive and professional working relationships with all colleagues.
- Participate in team meetings, training sessions, and service reviews as required.

*This job description is not exhaustive or exclusive. It provides a summary of the main areas of responsibility and may be amended in line with the evolving needs of the organisation.*



# Person specification

## Essential

- Demonstrable knowledge and experience of money advice and welfare benefits.
- Strong oral communication skills, particularly in negotiating and representing clients.
- Effective written communication skills for correspondence, case reviews, and reporting.
- Effective IT skills for case recording and management.
- A methodical approach to casework, with the ability to follow and improve procedures.

- Understanding of the issues involved in interviewing and advising clients.
- Numeracy sufficient to carry out calculations involved in benefits and debt advice.
- Ability to prioritise tasks, meet deadlines, and manage a busy caseload.
- Competence in using IT for case recording, research, and report writing.
- Ability to give and receive feedback constructively and sensitively.
- Willingness to work as part of a team and support colleagues.
- Ability to monitor, maintain and reflect on personal standards of performance.
- Awareness of social trends and how they impact clients and service provision.
- Commitment to the aims and values of the Citizens Advice service, including a strong understanding of and commitment to equity, diversity and inclusion.

*This person specification is not exhaustive or exclusive and may be amended in line with the evolving needs of the organisation.*



## Terms and conditions

### Money Adviser (Trainees Considered)

**Hours:** Full-time (37 hours per week –some flexible working)

**Location:** Ilkeston (hybrid mix of home and office working)

**Contract:** 1-year (with potential to extend or become permanent)

**Salary:** £26,366 to £28,825 per annum (depending on experience)

- **Generous Annual Leave Entitlement:** 35 days per year (pro rata)
- **Buy/Sell Annual Leave Scheme:** buy or sell up to 1 week of annual leave (pro rata)
- **Employee Assistance Programme:** including perks, wellbeing activities and free counselling
- **Contractual sick pay:** (amount dependent on length of service)
- **Long Service Awards:** Additional leave days and gift cards awarded above 5 years of service
- **Pension:** Auto-enrolment workplace pension, with 6% employer contribution and a 2% employee contribution.

In accordance with Citizens Advice policy the successful applicant will be required to undergo a Disclosure and Barring Service (DBS) check. Please get in touch to see our policy on DBS checks and ex-offenders.



# 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 check.





Please add your covering letter here, insert or attach a copy of your CV and return to [hr@ddcab.org.uk](mailto:hr@ddcab.org.uk).

Name:	
Vacancy:	
Brief description of why you will be suitable for this role:	
References:	
Please provide the names, addresses, telephone numbers and email addresses of two people who may be approached for references. One of these should be your present or most recent employer, the other could 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 post applied for. References will only be taken up for successful candidates following interview.	
Referee 1	
Name	
Organisation	
Address Postcode	
Telephone	
Email	
In which context does this referee know you?	
Referee 2	
Name	
Organisation	
Address Postcode	
Telephone	
Email	
In which context does this referee know you?	
Entitlement to work in the UK To take up this post you must have the right to work in the UK. Please note that Citizens Advice Derbyshire Districts does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.	
Do you have an entitlement to work in the UK? Yes / No	



### Criminal Convictions

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. More information can be found in the information pack. Please get in touch to see our policy on criminal background checks.

Have you had any previous convictions not regarded as spent under the Rehabilitation of Offenders Act 1974? Yes / No

If yes, please provide details of the offence and the date of conviction:

### Declaration

Data Protection Statement: I consent to this information being processed and stored for the purpose of recruitment and selection at Citizens Advice Derbyshire Districts, and if appointed, for the purposes of employment at Citizens Advice Derbyshire Districts.

I confirm that to the best of my knowledge, the information I have provided in the recruitment process is true and correct. I understand that if appointed on the basis of false information, I may be summarily dismissed.

Signed:

Date:

**Confidential diversity monitoring form :**

Please note this section will be detached before sending your application to the recruitment panel for shortlisting. The panel will not see this information and it will not affect your application.

The Citizens Advice service is committed to valuing diversity and promoting equality. We encourage and welcome applications from suitably qualified candidates from all backgrounds regardless of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation.

In order to achieve these aims we need to know about the diversity of people who apply to work in the service. Please help us by providing the information requested in the form below

**Data protection overview**

If you are happy to provide it, we will use this information for the sole purpose of allowing us to monitor the diversity of our applicants. The information you give us will be kept securely, won't be shared outside the service and is confidential. It will not be seen by anyone responsible for making recruitment decisions or have any impact on you directly.

If you are successful in your application and we require this information for other purposes, you will be asked to provide it separately - i.e. this form will not be used for other purposes. If you would prefer not to answer any of the questions we ask, please leave them blank. If you would like us stop using the information you provide, please contact us.

**How did you hear about this opportunity?**

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**Age - Which age bracket do you fit into?**

Under 25	
25 - 34	
35 - 44	
45 - 54	
55 - 64	
65 and over	
Prefer not to say	

**Gender - What best describes your gender?**

Female	
Male	
I prefer to use another term – please write in.....	
Prefer not to say	

**Gender identity - Do you identify as \*Trans?**

Yes	
No	
Prefer not to say	

\*Trans is an umbrella term to describe people whose identity is not the same as the sex they were assigned at birth. People under the trans umbrella may describe themselves using one or more of a wide variety of terms – including transgender.

**Sexual orientation - What is your sexual orientation?**

Bisexual	
Gay Man	
Gay Woman/Lesbian	
Heterosexual/Straight	
I prefer to use another term – please write in.....	
Prefer not to say	

**Disability - Do you consider yourself to be disabled or do you have a long term health condition?**

Yes	
No	
Prefer not to say	

**Neurodiversity - Do you consider yourself to be neurodiverse?\***

Yes	
No	
Prefer not to say	

\*Neurodiverse is an umbrella term to describe a number of neurodevelopmental conditions including ADHD, autism, dyslexia, dyspraxia, dyscalculia and dysgraphia.

The information on this form is for monitoring purposes only. If you require any reasonable adjustments to be made in the recruitment process or at work subsequently if appointed, please make sure you tell us separately from this form. We follow the social model of disability which believes that it is the barriers created by society which disable people. We will use reasonable adjustments wherever possible to remove those barriers.

**Religion or belief - Which group below do you most identify with?**

Buddhist	
Christian (including all denominations)	
Hindu	
Jewish	
Muslim	
No religion	
Sikh	
Any other religion or belief – please write in.....	

**Ethnic origin - How would you describe yourself?**

Asian/Asian British	Bangladeshi	
	Chinese	
	Indian	
	Pakistani	
	Any other Asian Background Please write in.....	
Black/African/ Caribbean/Black British	African	
	Caribbean	
	Any other Black/African/Caribbean background Please write in.....	
Mixed/multiple ethnic groups	White & Asian	
	White & Black African	
	White & Black Caribbean	
	Any other mixed/multiple ethnic background Please write in.....	
White	British/English/Northern Irish/Scottish/Welsh	
	Gypsy or Traveller	
	Irish	
	Any other White background Please write in.....	
Other ethnic group	Arab	
	Other ethnic origin Please write in.....	
Prefer not to say		

**Thank you for your co-operation**