

**Debt Trainee/Adviser Job Pack**

Thanks for your interest in working at Citizens Advice Knowsley. This job 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
* Overview of Citizens Advice and Citizens Advice Knowsley
* The role profile and personal specification
* What we give our staff
* **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.

**How Citizens Advice Knowsley works**

**Citizens Advice Knowsley have 3 main advice sites:**

Kirkby – Offices providing Generalist and Specialist Advice Services.  The District and Registered Company office is also based at the Kirkby Site as well as our Specialist Debt Caseworker Teams.

Huyton – Offices providing Generalist and Specialist Advice Services.

Halewood – Advice services provided at outreach locations

Volunteers are trained and work at all sites in the district and all our offices are in central town locations.

Mobility – all paid staff in the organisation may be required to work at any of the 3 Advice Sites and/or Outreach Services.

Closing Date for applications Monday 26th May 2025 at 5:00pm

Interviews will take place on Thursday 5th June 2025 at our Kirkby office

**We are committed to striving to achieve equal opportunities for everyone.**

Candidates selected for interview will be contacted by email with interview arrangements.  Please ensure that you provide an email on the application form.

We are unable to notify candidates who have not been shortlisted due to limited resources therefore if you have not been contacted by Thursday 29th May 2025 you can assume that your application has been unsuccessful.

**How we will use your information?**

The information you give us on the application form will be used to help us decide whether to recruit you as a member of staff - this is our ‘legitimate interest’ under data protection law. It will only be seen by staff involved in the recruitment process and will be stored securely.

If you are recruited, we will retain your contact information in order to involve and support you. We will also collect additional information, such as next of kin details, and over time records of training, support meetings and where relevant, appraisals. Again, it will be kept securely, and only those people who need to see your information in order to involve you will have access to it.

All use of applicant’s information will be relevant to their involvement, and may include:

* Contacting applicants when necessary
* Making reasonable adjustments to improve accessibility
* Monitoring statistical details of our applicants
* Providing ongoing support to applicants
* Addressing problems or complaints

You have legal rights over your data, including access to it, and the right to ask that it is corrected, restricted or deleted. There is more information on these rights on the Information Commissioner’s Office website: [www.ico.org.uk](http://www.ico.org.uk/)

 **Job description**

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| **Job title:** | Debt Adviser/Trainee |
| **Contract term** | Permanent |
| **Reporting to:**  | Debt Supervisor |
| **Salary:** | £25,000 to £29,110 dependant on experience |
| **Hours:** | 35 hr. p.w. |
| **Employers’ Pension contribution:** | 6% |
| **Location:** | The role is based at our Kirkby and Huyton offices, with some home working available |
| **Role Purpose** | To assist in providing an efficient and effective debt casework/advice service. |

 **Role profile**

### **General**

* Uphold the aims and principles of the Citizens Advice Service
* Work within the Service’s policies and values, especially equal opportunity and anti-discrimination policies
* Work within health and safety guidelines and principles, sharing responsibility for own health and safety and that of colleagues.
* Keep up to date with legislation, policies and procedures and undertake appropriate training, ensuring any relevant training requirements are observed.
* Read relevant publications.
* Attend relevant internal and external meetings as agreed with the Debt Supervisor
* Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate.
* To work to Key Performance Indicators.

**Casework**

* Provide casework covering the full range of debt 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 welfare 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, where necessary and subject to resources.
* Provide advice and assistance to other Staff and Volunteers across the whole range of debt issues.
* Ensure that all casework conforms to the Office Manual and any Quality Marks.
* Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
* Ensure that all work conforms to systems and procedures.

**Social policy**

* Assist with social policy work by providing information about Clients' circumstances through the appropriate channel.
* Alert Clients to social policy options.
* Keep up to date with social policy issues

**Research and campaigns**

* Assist with research and campaigns work by providing information about clients' circumstances through the appropriate channel.
* Alert clients to research and campaigns options.

**Professional development**

* Keep up to date with legislation, policies and procedures 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/staff meetings as appropriate.

**Administration**

* Use IT for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production. Ensure IT information assurance training is completed on an annual basis.
* Ensure that all work conforms to the bureau's systems and procedures.

**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 CAB service.



**Person specification**

* Knowledge and experience of giving Debt Advice to clients and working to quality standards and Funders requirements. **(Desirable)**

* Ability to provide initial assessment for client

* Having or commitment to working towards IMA Certificate in Money Advice Practice.

* Effective oral & written communication skills with emphasis on negotiation, representing and preparing reviews, reports & correspondence.

* Ability to prioritise own work, meet deadlines and targets, manage caseload, monitor and maintain own standards.

* Ability to work as part of a team, to give and receive feedback objectively and sensitively and a willingness to challenge constructively.

* Ability to use IT Systems in the provision of advice, Case Recording, preparation of reports and submissions.

* Understanding of the importance of social policy work / key current social issues, and their impact on clients.

* Understanding of and commitment to the aims and principles of the Citizens Advice service and its equal opportunities policies.

* **What we give our staff**

25 days annual leave, plus bank holidays.

Flexible working hours.

Comprehensive training and development package.

Employer 6% pension contribution.