



Benefits & Money Advice Caseworker Job pack

Thanks for your interest in working at Citizens Advice Epsom & Ewell. 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
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice Epsom & Ewell
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Jennie Purvis by emailing support@caee.org.uk or calling 01372300777.

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.

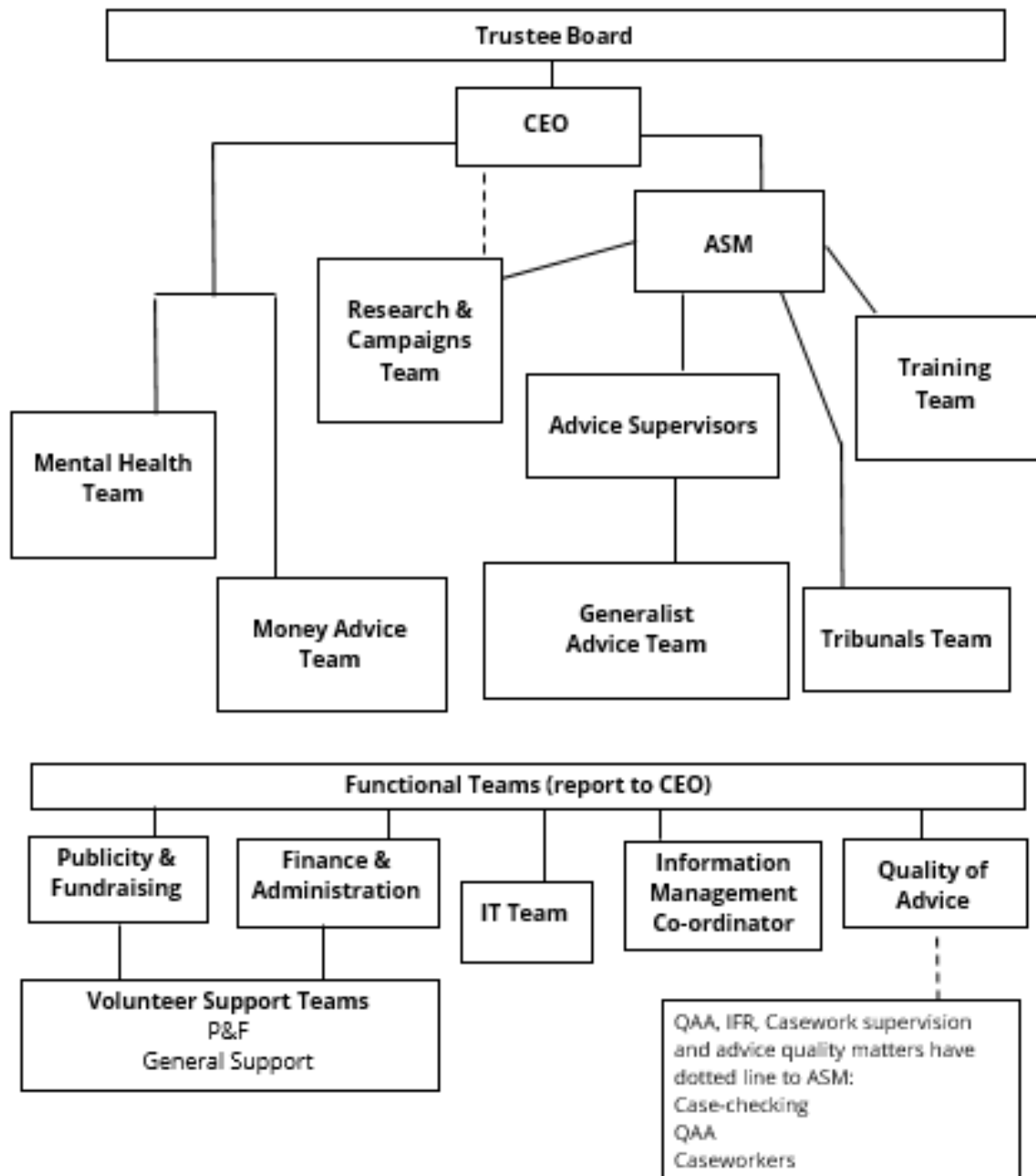
3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

About Citizens Advice Epsom & Ewell

Location:	The Old Town Hall, The Parade, Epsom, Surrey, KT18 5AG
Service Delivery:	We deliver our service through as many different channels as we can, to make sure we are accessible to everyone. This includes face to face, phone, video conferencing and email. The role will involve outreach and is office based but there is opportunity for some hybrid working.
Specialist services:	Mid and East Surrey Mental Health Outreach service for clients with mental health issues across Mid and East Surrey. Specialist Money Advice for local people with critical debt issues Legal Aid Housing solicitor Tribunals & Appeals
Specialist access:	Textphone for deaf clients, Wheelchair access, Disabled toilet, Phone translation service
Number of new enquiries:	Approximately 3,000 per annum
Number of client contacts:	Approximately 11,000 per annum
Main types of enquiries:	Benefits, debt, housing and employment
Number of volunteers:	50 advisers and assessors (incl trainees) 13 paid staff 10 members of the Trustee Board
Area served:	Borough of Epsom and Ewell
Population:	80,900 (taken from the 2021 census)

While Epsom & Ewell as a whole is relatively well-off, this masks 2 wards with the highest deprivation indices. Epsom & Ewell has the highest percentage of ethnic minority groups among all the districts in Surrey.

Organisation Chart



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.

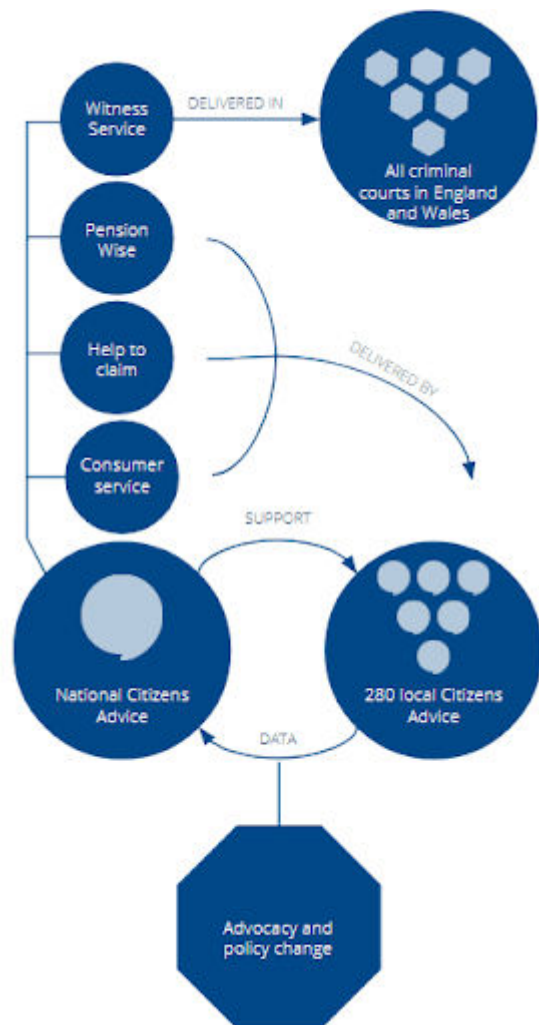
This role sits our network of independent charities, delivering services from

- 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

We are looking for a self-motivated individual who can work equally well as part of a team or on their own initiative to help us deliver a new partnership project across Epsom and Ewell and surrounding areas funded by the National Lottery Community Fund.

You will be delivering Information and Advice on a wide range of issues but primarily on Benefits and Debt to improve the financial capability and resilience of clients needing support to manage their mental wellbeing.

You will help promote the service to local stakeholders and partners.

You will have a good knowledge and understanding of advice giving, although this does not have to be within a Citizens Advice setting. We will support the right person through Citizens Advice accredited training.

You will have the ability to support clients in a sensitive but empowering way to help them solve their problems, build resilience and avoid future issues.

Ideally, you'll have experience of working with clients who present in crisis situations.

This is a great opportunity for someone looking to make a difference in people's lives, supporting some of the most vulnerable people in society – helping them find a way forward.

We value diversity, promote equality and challenge discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from people with disabilities and people from Black, Asian and Minority Ethnic groups, as they are currently under-represented in our workforce.



Role profile

Advice giving

- Strong knowledge and experience of directly supporting clients by providing information advice on welfare benefits and money management.
- Ensuring income maximisation through the take up of appropriate benefits and application for grants as appropriate
- Assisting clients with other related problems, including making referrals and contacting other agencies, including acting as an advocate where necessary, for example at benefit appeal tribunals
- Working with the project partners to refer clients for additional support needs
- To carry out community outreach appointments with the target client base
- Use available and approved information sources to find, interpret and communicate the relevant information.
- Research and explore options and implications so that clients can make informed decisions.
- Ensure that all work conforms to relevant internal and external quality standards including the organisation's office manual, the Advice Quality standard and the Financial Conduct Authority.
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

Research and Campaigns

- Assist with research and campaigns work by providing information as appropriate.

Professional Development

- Keep up to date with legislation, policies and procedures and undertake appropriate training.
- Attend relevant internal and external meetings as agreed with line manager.
- Complete required training to comply with quality assurance processes.

Administration

- Use IT for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production.
- Ensure all work conforms to the organisation's systems and procedures.

Other

- Carry out any task that may be within the scope of the post to ensure the effective delivery and development of the service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Create a positive working environment where equality and diversity are well managed, dignity at work is upheld and staff can do their best.



Person specification

Essential Criteria

- Proven ability to deal sensitively with vulnerable clients to get to the root of issues and empower clients, whilst maintaining structure and control of meetings.
- Proven ability to deal with benefit, housing and money advice related enquiries and casework.
- Ability to cope with challenging situations, build rapport with clients in difficult circumstances and be able to challenge constructively.
- Understanding of the issues affecting society and their implications for the client and service provision.
- Ability to research, analyse and interpret complex information, record casework, produce and present clear reports verbally and in writing.
- Excellent communication skills both verbally and in writing.
- Ability to work on your own initiative and monitor and maintain your own standards of work.
- Experience of using IT systems in the provision of advice and the preparation of reports and submissions.

- A commitment to continuous professional development, including a willingness to develop knowledge and skills in advice topics.
- A good understanding of equality, diversity and inclusion.
- Commitment to work within the aims, principles and policies of the Citizens Advice Service

Desirable

- Current valid driving licence and unrestricted use of private transport.
- Experience of working in an advice setting.
- Experience of working with vulnerable people.
- Knowledge of Citizens Advice enquiry areas.

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



Terms and conditions

Salary:	£26,000 - £29,000 FTE depending on relevant experience and/or qualifications.
Employer pension contribution:	3%
Annual leave:	25 days (plus bank holidays)
Hours per week:	35 hours per week (Part time and job share applications are also welcomed)
Type of contract:	Fixed Term (3 years)
Location:	The Old Town Hall, Epsom with outreach and potential for some hybrid working