



Citizens Advice Taunton  
St Mary's House  
Magdalene Street  
Taunton, TA1 1SB

[tauntoncab.org.uk](http://tauntoncab.org.uk)

Citizens Advice Taunton

Debt Advisor (Homelessness Reduction Act)

(fixed term appointment until 28-2-19)

Role Description & Person Specification (February 2018)

## Reporting to

Core Advice Services Manager

## Context

The Debt Advisor will work exclusively with clients who have approached the local housing authority for assistance under the Homelessness Reduction Act 2017. The aim is to address their debt issues in order to help resolve a risk of homelessness, or to increase the client's chances of securing new housing.

They will also deliver financial education to individuals; this includes budgeting skills, general money management skills, and opening appropriate accounts. These are preventative and early intervention techniques that will empower the client to help them manage their money and also stop them getting into a cycle of debt.

## Role Description

### Advice

- Provide debt casework.
- Negotiate with third parties as appropriate.
- Ensure income maximisation through the take up of benefits.
- Offer representation in court where appropriate.
- Maintain case records to enable continuity of casework, information retrieval, statistical monitoring and report preparation.

### Networking

- Establish, develop and maintain a range of partnerships to reach clients and gain support for the project.
- Develop literature to promote the project and carry out other marketing activities such as writing press releases or delivering presentations.
- Attend relevant external meetings.

### Financial Education activities

- Deliver financial capability learning activities
- Ensure that learning activities are well organised
- Collate and review feedback on learner outcomes and the quality of the service.

### Research & Campaigns and monitoring

- Assist with Research & Campaign work by providing information about clients' circumstances through the appropriate channel.
- Provide statistical information on the number of clients and nature of cases and provide

regular reports to bureau management.

### **Other duties and responsibilities**

- Establish and maintain effective and efficient administration systems.
- Use IT for statistical recording, record keeping and document production.
- Participate fully in the life of the office, attending workers' meetings, internal planning events etc. as agreed with line manager.
- Support other work as required (e.g. providing referrals for advice appointments where appropriate).
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Carry out any other appropriate tasks requested by management, to ensure the effective delivery and development of the service.

## **Person specification**

### Essential

- Previous completion, or the ability to quickly complete the following;
  - Citizens Advice advisor training
  - M.A.S. accreditation for meeting the relevant FCA debt advice requirements
- Experience of delivering debt advice ideally including advice on bankruptcy and Debt Relief Orders;
- Ability to effectively manage a caseload
- Excellent interpersonal, communication and presentation skills.
- Ability to collect, analyse and present project data and monitor progress against objectives.
- Experience of establishing and developing partnerships with other agencies and joint working.
- Ability to sensitively empower and engage with adults in need of financial capability skills.
- Ability and willingness to work both on own initiative and as part of a team.
- Ability to self-motivate and organise a diverse workload.
- Ability to use IT applications to record statistics, produce documents and training materials and keep accurate project records.
- Understanding of and commitment to the aims and principles of the CA service and its equal opportunities policies.

### Desirable

- Representation at tribunals or court.
- Experience of delivering financial literacy education.
- DRO Intermediary status.
- Understanding of theory and principles of adult learning and development.

## Terms and conditions for this role:

Due to funding this is a fixed term appointment until 28-2-19.

Location: St Mary's House, Magdalene Street, Taunton, TA1 1SB

Hours: 12 hours per week, including 7.5 hours on Thursdays

Salary: £22,500 pa, pro-rata