

**North Bristol Advice Centre  
2 Gainsborough Square  
Lockleaze  
Bristol  
BS7 9XA  
Tel: 0117 9515751  
[www.northbristoladvice.org.uk](http://www.northbristoladvice.org.uk)**

Job Title:	<b>Money Advice Caseworker</b>
Responsible to:	Debt Team Leader
Grade & Salary:	£28,883 to £30,849 (+ 4% employer contribution to pension scheme)
Contract Term:	Permanent
Working Hours:	28 hours per week
Place of Work:	Hybrid/NBAC Office
Probationary Period:	Three months

North Bristol Advice Centre (NBAC), is an independent charity that has been delivering advice and community services across North Bristol and South Gloucestershire since 1984. Our aim is to promote social justice and combat poverty by providing free and independent welfare benefits and debt advice to over 1800 people each year.

NBAC is a values-based organisation with the needs of our clients and local communities at the heart of everything we do. We have a solid reputation for high quality, expert advice delivered in a holistic, person-centred way, and a strong track record of innovation and partnership working. A commitment to equality, diversity and inclusion is central to NBAC's ethos.

### **Main Purpose of Job**

**To deliver specialist debt advice and casework services at NBAC's main office in North Bristol.**

**To contribute to NBAC's wider mission of providing services that support and strengthen the health and wellbeing of the communities we serve.**

### **Key Responsibilities**

- 1 To deliver high quality debt advice and casework services at NBAC's main office in North Bristol by means of face-to-face and telephone appointments.
- 2 Manage a busy caseload independently ensuring timely and accurate case recording
- 3 Communicate complex information clearly, both verbally and in writing, adapting your approach to meet a clients' needs

- 4 Summarise complex information from legal documents, creditor correspondence and guidance into simple, accessible terms for clients
- 5 Demonstrate strong literacy and comprehension skills when interpreting legislation, guidance and financial documents
- 6 Work with resilience and professionalism when dealing with clients in distressing or challenging circumstances
- 7 Keep up to date with changes in debt advice policy, practice and welfare reform
- 8 Liaise with creditors, housing providers and other external agencies on behalf of the clients
- 9 Maintain accurate case records in our dedicated case management system.
- 10 Prepare for and attend supervision, team and management meetings as appropriate.
- 11 Provide case studies and feed into NBAC's wide social policy work.
- 12 To work at all times within NBAC's policies and procedures as detailed in the NBAC' Staff Handbook and Office Manual.
- 13 To undertake other reasonable tasks as required to ensure compliance with funding agreements/contracts and to assist in the running of the service.
- 14 To ensure that the Equality and Diversity policy of NBAC is implemented in all aspects of the work of the post holder.

### **Professional Development**

- 15 Keep up to date with changes in debt advice, policy, practice and welfare reform and undertake appropriate training as directed by the Debt Team Leader.

### Debt/Money Advice Caseworker - Person Specification

The post-holder is required to be self-motivated with strong communication skills, able to work as part of a team and prioritize their own workload.

Skills & Abilities		Essential	Desirable
<b>Education, Vocational Training &amp; Qualifications</b>	<ul style="list-style-type: none"><li>Degree or equivalent relevant qualification, or substantial training and experience in relevant role</li><li>Provide high-quality debt advice in line with regulatory standards and organisational procedures</li><li>Qualified in Money Advice to MaPS contract standard</li><li>Experience of working as an Approved Intermediary</li></ul>	X  X  X	   X
<b>Experience</b>	<ul style="list-style-type: none"><li>Proven experience of providing debt advice in line with regulatory standards and organisational procedures</li><li>Experience of working under pressure and achieving individual targets against contract demands</li><li>Experience of using electronic case management systems</li><li>Experience of using the Advice-Pro software system</li></ul>	X  X  X	   X
<b>Knowledge &amp; Understanding</b>	<ul style="list-style-type: none"><li>Understanding of the voluntary sector and the advice environment</li><li>Understanding of the needs of service users in a disadvantaged area</li><li>Knowledge of welfare benefits and housing issues</li></ul>	X  X	  X
<b>Technical Skills &amp; Abilities</b>	<ul style="list-style-type: none"><li>Proficient using MS365 operating system including, Word, Outlook and Excel.</li><li>Demonstrate strong literacy and comprehension skills when reviewing financial documents</li><li>Excellent communication skills (oral &amp; written) with particular emphasis for interpreting financial documents and complex processes into simple, accessible terms for client</li></ul>	X  X  X	

	<ul style="list-style-type: none"> <li>• Emotional resilience, with the ability to remain calm and professional under pressure</li> <li>• Have an ordered approach to casework and an ability to follow agreed procedures and quality standards</li> </ul>	X  X	
<b>Interpersonal skills, motivation and commitment</b>	<ul style="list-style-type: none"> <li>• Ability to liaise effectively and positively with a wide range of individuals and external organisations, particularly creditors and housing providers</li> <li>• Able to work on own initiative, prioritising and managing own workload and time to meet targets and deadlines</li> <li>• Ability to work effectively as part of a team</li> <li>• A flexible approach to work</li> <li>• A commitment to work within NBAC's Equality and Diversity Policy</li> </ul>	X  X  X  X  X	