



**St Vincent de Paul Society
(England & Wales)**

JOB DESCRIPTION

Job title: Advice Caseworker (Debt Specialist)

Reports to: Deputy Centre Manager

Objectives:

- To deliver triage assessment and advice at first contact to streamline client access to information, self-help, or advice services quickly, efficiently and at an appropriate level.
- To provide advice at outreach venues and over the phone to clients, including income maximisation, through the take up of appropriate benefits and housing issues, form filling, researching and exploring options, assisting the client where necessary to find an appropriate solution, and written appeal submissions to HMCTS (no court attendance in person necessary).
- To play an active part in delivering the objectives of the BMDC Advice Contract, by working towards, and contributing to, the transformation and improved targeting and effectiveness of the service over the life of the contract.

Main Responsibilities:

- To provide specialist level debt advice and assistance with budgeting and income maximisation sources, along with generalist welfare and housing advice.
- Interview clients using sensitive listening and assertive questioning skills to allow clients to explain their problem(s) and to empower them to set their own priorities.
- Deliver appropriate advice during triage and make appropriate judgements about signposting of clients to appropriate self-help resources or booking appropriate appointment at an online or face to face outreach session.
- Use relevant resources to find, interpret and communicate the appropriate information.
- Research and explore options and implications so that clients can make informed decisions.
- Advocate for the client where necessary, for example by calculating, negotiating, drafting or writing letters, emails and telephoning.
- Liaising with creditors and other organisations to resolve debt situations.
- Produce financial statements and explain these to client.
- Maximise income checks and benefit checks where appropriate.
- Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
- Ensure that all work conforms to BMDC contract and SVP policies and procedures.
- Ensure all work complies with the relevant advice quality standard.
- Maintain detailed and up-to-date case records for the purpose of continuity of casework, information retrieval, statistical monitoring, and report preparation.

- Complete all case details on Advice Pro and maintain accurate records in a timely and efficient manner according to policy and procedures.
- Provide statistical and outcomes data on client cases and nature of cases/outcomes.
- Keep up to date with legislation, policies and procedures and undertake appropriate training.
- Keep up to date by reading relevant publications and maintaining Continuous Professional Development (CPD) of 16 points per year.
- Attend relevant internal and external meetings as agreed with the line manager.
- Complete the required generalist and specialist training to comply with MaPS, AQS, SVP etc. quality assurance requirements.
- Demonstrate commitment to the aims and ethos of the SVP and the effective delivery of services.
- Compliance with health and safety policies and procedures and ensure responsibility for own safety and that of others.
- Actively engage with the growth and development of the SVP advice services, supporting the involvement and growth of volunteers, trainees, students, and placements within the project.
- Be an ambassador for the project and wider SVP, including occasional attendance at panels, project group meetings or SVP meetings.
- Perform other duties and responsibilities as may be required from time-to-time in support of the project and wider SVP.

The above list is not exhaustive and duties relevant to the post or the individual's experience may be required from time to time. Variation may also occur to the duties, responsibilities and place of work at the request of your line manager without changing the general character of the post. Any variation will always be discussed with the post holder and their line manager.

PERSON SPECIFICATION – ADVICE CASEWORKER

Attributes	Essential	Desirable
Qualifications & Training	• Either have the relevant qualifications and experience to be a Debt Relief Order Intermediary or be willing to work towards this requirement. • Evidence of maintaining CPD with relation to Debt.	• Possess CertMap qualification or be willing to study towards this.
Experience	• Previous experience of giving debt advice. • Demonstrated ability to deliver appropriate advice on a range of Debt areas. • Experience in giving benefit and/or housing advice. • Experience giving face to face, client focused debt advice. • Experience of casework and managing a large caseload.	• Experience of case checking and carrying out audits on debt advice cases. • Experience of producing reports including statistical reports.
Knowledge	• An ability to demonstrate an ordered approach to managing debt advice plans methodically, within defined systems and procedures. • Evidence of up-to-date knowledge on legislation relating to Debt advice. • Demonstrated knowledge and use of IT systems, including case management systems.	• Understanding and experience of meeting the regulatory requirements in providing debt advice, especially around MaPS, FCA and AQS. • Up-to-date knowledge of legislation relating to benefit and/or housing advice.
Skills & Attributes	• Hold a current UK driver's licence and have own transport. • Effective written and oral communication skills with particular emphasis on negotiating. • Ability to manage own caseload and time effectively. • Ability to monitor and maintain own standards. • A commitment to continuous professional development,	• Empathy and understanding of SVP ethos and values – and commitment to them.

	including willingness to develop knowledge and skills in advice topics. • Ability to research, analyse and interpret complex information and produce and present clear reports verbally and in writing. • Ability to understand statistics and check accuracy of calculations.	
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