

> **Job Title:** Debt Advice Specialist

## Key work areas and tasks

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The Debt Advice Specialist will be responsible for providing advice and explaining debt options to clients, to identify next steps and assist clients to achieve debt solutions. They will also help to develop a team of paid staff and volunteer advisers to ensure they deliver quality advice and information to members of the public.

### Delivery of Debt Advice

- > Provide specialist debt advice to clients, identifying the nature and extent of the problem, checking for liability and enforceability and responding appropriately to any emergencies
- > Understand the triggers for debt problems and explore these with the client, while building a team of competent volunteer/paid advisers to support this work.
- > Ensure that appropriate systems are developed and maintained for case recording, statistics, follow up work and quality control
- > Monitor the quality of advice given to clients by carrying out case quality checks and examining case records, giving appropriate feedback
- > Provide an appropriate level of support and supervision based on individual needs and act as a support for the advisers.
- > Provide supervision and support for paid and voluntary advisers, particularly in relation to money advice, CASTLE data entry and enquiry entry and on complex casework
- > Support advisers to produce accurate, legible and complete client records
- > Ensure that research work, telephone calls and/or correspondence relating to casework is undertaken timeously
- > To provide statistical information and analysis for the CEO and completion of relevant funder reports within deadline
- > Actively implement the Aims and Principles of the CAB service, together with its other policies

### Case Checking and Quality Standards

- > The service operates uniform quality standards in advice giving and CASTLE case recording and it will be the responsibility of the Debt Advice Specialist to monitor levels, accuracy and quality of the advice work undertaken by the advisers in relation to welfare benefits, equalities and human rights
- > Lead on the preparation for Scottish National Standards re-accreditation for money advice
- > Support adherence to and continuous development of the Bureau's quality standards awards

- CAS Membership Quality Audit Standards
- Scottish National Standards in Advice Giving

### **Casework**

- > Management of own caseload
- > The Debt Advice Specialist will encourage and support volunteer and paid advisers' professional development to undertake more complex casework

### **Supporting Staff/Volunteers**

- > Championing teamwork approach between all members of staff and volunteers
- > Effective performance management through coaching, mentoring and empowering individuals
- > Ensuring all policies and procedures are followed in a consistent manner by advice workers explaining the importance of compliance with regulatory frameworks for advice

### **Training and development**

- > Contribute towards the Bureau's training and development plan so that staff and volunteers have the skills and knowledge required to do their jobs effectively and efficiently in relation to debt work
- > Identify and implement own training and development needs in conjunction with CEO

### **Social Policy**

- > Support the identification of social policy issues arising from client casework and their submission to Citizens Advice Scotland and other appropriate bodies

### **Communication**

- > To ensure that all office information about debt is up-to-date and volunteers and staff are kept informed
- > Advisernet is continuously updated and it will be the responsibility of the Debt Advice Specialist to ensure that advisers are kept aware of changes in in-house procedures and practices and major legislative changes, particularly in relation to money advice.

### **Other duties and responsibilities**

- > Carry out any other tasks which may be within the scope of the post to ensure the effective delivery and development of the service

- > The Debt Advice Specialist may be required to undertake other duties relevant to the level of responsibilities and accountabilities of the post

## Person specification

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### Qualifications

#### Essential

- > Current full driving licence
- > Money Advice training up to Type III
- > Willing to undertake appropriate further education and training
- > Completion of CAB adviser training

#### Desirable

- > CAS Session Supervision, Tutor, Mentoring, Quality of Advice Giving Training

### Experience

#### Essential

- > Experience of working within the voluntary sector and working with volunteers
- > Experience in providing high quality advice on a wide range of subjects
- > Supervisory experience in advice work (Project Management and/or Session Supervision)
- > Experience in managing quality standards within a quality control framework
- > Experience of prioritising own work and the work of others meeting deadlines and managing workload in a pressurised environment
- > Experience in staff training and supervision
- > Experienced in office administration with a good understanding of office technology and the role of effective IT systems

#### Desirable

- > Experience of managing case work
- > Recent and ongoing experience of advice work delivered to either Citizens Advice Scotland Membership requirements and/or Scottish Governments National Standards for Advice and Information Providers

### Skills and Attributes

- > Ability to work without close supervision, prioritise own work and meet deadlines
- > Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively
- > Ability to work under pressure and make measured, appropriate responses in often complex situations
- > Ability to deliver against multiple priorities
- > Ability to work as part of a team and manage change

### **Values and Attitudes**

- > Support of the principle of voluntarism
- > Commitment to equality of opportunity within the CAB and its services
- > Clear understanding of the importance of excellent customer service
- > Commitment to the aims and principles of the CAB service and its equal opportunities policies
- > Commitment to personal development

### **Knowledge**

- > Understanding of the challenges within our community.
- > An understanding of the needs of the funders relating to clients, client profiles, recording of cases and financial gain
- > Understanding of the current and evolving advice sector landscape
- > Awareness of the needs and responsibilities of GDPR and Data Protection Act

### **Other Essential**

- > A willingness to identify and undertake relevant training
- > Ability to work flexibly

**The Glasgow North West Citizens Advice Bureau is committed to equal opportunities both in service provision and employment.**

**Charity number: SCO05641**

**Charity name: Glasgow North West Citizens Advice Service**