

# Kirklees Citizens Advice and Law Centre

## Job Description

<b>Job title</b>	Debt Assistant
<b>Reporting to</b>	Money & Pension Service Manager
<b>Purpose of Job</b>	The aim of the post is to be able to deliver the initial debt assessment process whether by face to face or by e-mail to identify client debt needs and to be able to identify the appropriate next steps. It is also to assist with debt caseworker's casework as required. This may form the result of administrative support to the debt team or by contacting clients or creditors as required. The assistant would report to the Money & Pension Service Manager.

### Duties and Responsibilities

#### Assist with debt assessments and client casework as required

- Undertake debt assessments utilising Citizens Advice Common Initial Assessment framework as required either by telephone, face to face or at an outreach venue.
- Interview clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities.
- Assist the client to be able to draw up a personalized budget which reflects their financial situations
- To be able to identify emergency debt situations which will require immediate debt advice support from a caseworker
- To be able to identify client required next steps
- Research and explore options and implications so that clients can make informed decisions.
- Refer internally or to other specialist agencies as appropriate. This would include for example benefit checks etc.
- Ensure that all work conforms to the bureau's Office Manual and the Citizens Advice quality standard.
- Maintain detailed case records as set out by Citizens Advice Quality of Advice standards, for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Work cooperatively with colleagues and encourage good teamwork, clear lines of communication and common practices within the bureau.
- Support the Debt Advice Service Manager to review quality of advice across the team and ensure standards are maintained

## **Research and campaigns**

- Assist with research and campaigns work by providing information about clients' circumstances through the appropriate channel.
- Alert clients to research and campaign options.

## **Professional development**

- Keep up to date with legislation, policies and procedures and undertake appropriate training.
- Read relevant publications.
- Attend relevant internal and external meetings as agreed with the line manager.
- Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate.
- Identify own learning and development needs and take steps to address these.

## **Administration**

- Use IT for statistical recording, record keeping and document production.
- Develop and maintain effective admin systems and records relevant to the role.
- Monitor and evaluate activities appropriate to the role and contribute to the bureau planning process by providing regular reports and feedback on the areas of responsibility.
- Ensure that all work conforms to the bureau's systems and procedures.

## **Other duties and responsibilities**

- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
- Demonstrate commitment to the aims and policies of the KCALC service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Flexibility to work from any of our offices and outreach venues in Kirklees as and when necessary.

## **Organisational Ethos and Expectations**

- Have a commitment to the aims, objectives and ethos of the organisation, and follow policies, procedures and systems.
- Keep the clients' needs at the centre of all the organisation's activity, seeking to deliver the best possible service within resource and operational constraints
- Communicate well and appropriately with colleagues and clients, keeping others informed and consulting as much as possible
- Have a professional attitude, being flexible, supportive and cooperative in working together with other staff members and volunteers.
- Show respect for all colleagues, volunteers and clients in how they speak and act
- and always behave in a non-judgemental way
- Be willing to learn, accept constructive feedback, adapt to change, always aim to improve efficiency and quality, and take responsibility for their own work.