

Date: July 2023

Dear Applicant

Re Senior Money Adviser

Thank you for your interest in this post to work in our Croydon office, on outreach and remotely.

I am pleased to enclose:

- Job Description and Person Specification for Senior Money Adviser
- Guidelines for Applicants
- Organisation Summary

You can download the application form from our website.

This post has been funded by Debt Free Advice

The closing date for receipt of applications is Thursday 31 August at 5pm. Applications should be sent by email to recruitment@swllc.org.

Yours faithfully

Patrick Marples CEO
South West London Law Centres

SENIOR ADVISER – DEBT FREE ADVICE - JOB DESCRIPTION

Post:	Senior Adviser – Debt Free Advice project
Responsible to:	Money Advice Team Leader
Line Manages:	Money advice caseworkers, assistants and trainees
Functional Links:	Senior Management Team, Board of Trustees, Team Leaders, Administrators
Hours:	35 hours per week
Holidays:	29 days p.a plus Bank Holidays
Salary:	£35,664 per annum

1. PURPOSE OF THE POST

- a) The post-holder will advise and represent clients who live or work in South West London with the whole range of Money Advice cases, taking cases as necessary to all levels of courts and tribunals.
- b) The post-holder reporting to the Money Advice Team Leader will line-manage the money advice caseworkers, assistants and trainees allocated to the Debt Free Advice project, working within SWLLC's policies and procedures to make sure they meet their performance targets, maintain quality standards in line with regulation and contracts, and develop their professional skills. The post-holder will ensure maintenance of standards in accordance with Lexcel accreditation.
- c) The post-holder will work with the Money Advice Team Leader and the Senior Management Team to develop and implement new sustainable models of funding including the continuation of funding from Debt Free Advice

2. DUTIES & RESPONSIBILITIES

- a) To ensure that all advice, assistance and representation complies with our quality assurance standard Lexcel,
- b) To ensure proper time recording, data collection and case recording within the Advice Pro casement system to achieve individual performance targets including under Debt Free Advice.
- c) To ensure that the terms of all SWLLC contracts and grants are kept in relation to advice & casework, including reports as required to the Board.

- d) To provide line management to a team of money advice caseworkers, assistants and trainees, monitoring performance against targets and ensuring caseworkers, assistants and trainees under supervision comply with contractual requirements and SWLLC policies and procedures.
- e) Provide mentoring support for caseworkers, assistants and trainees under your supervision.
- f) To follow the underperformance procedure for any caseworker, assistant or trainee in your team not meeting the performance targets within the guidelines set by the Money Advice Team Leader.
- g) To participate in staff meetings, formulating policy and allocating tasks.
- h) To be responsible for your own word processing, filing and case recording with assistance from volunteers and paid staff when appropriate and available.
- i) To provide talks and training for SWLLC staff and volunteers and to front line advice agency staff within SWLLC's catchment area in relation to money advice, as required.
- k) To advise front line advice staff in other agencies within the catchment area in relation to money advice.
- l) To assist with reports to funders and further funding applications.
- m) To be the main Debt Relief Order Intermediary for the service holding the appropriate qualifications to allow you to undertake this work.

3. ADVICE & CASEWORK

- a) To provide an advice and casework service to clients of SWLLC. This will include interviewing clients, advising them of their rights and responsibilities, assessing suitability and effectiveness of alternative courses of action, advising on legal procedures.
- b) To assist clients in liaising with other people and organisations to resolve their money advice problems where possible.
- c) To represent clients at Tribunals and Courts and do the necessary preparation and research.
- d) To visit clients at their homes if appropriate.
- e) To attend Counsel's chambers with clients as appropriate.
- f) To maintain at least 85% or higher in your Technical Reviews from the funder DFA

4. MANAGEMENT & SUPERVISION

- a) To regularly supervise money advice caseworkers, assistants and trainees. To hold formal staff reviews every quarter and complete a formal appraisal annually. This includes checking files and standards of work, going through case, data and time recording, ensuring that Lexcel standards and Debt Free Advice grant conditions are maintained.
- b) To monitor the assignment and allocation of new and existing casework within the Money Advice team as necessary to ensure grant compliance and appropriate cover where a member of the Money Advice Team is absent from work so that a professional standard of service is maintained at all times.
- c) To work with Debt Free Advice on technical file reviews that are undertaken externally and incorporate the feedback from the reviews to Money Advice team members to ensure agreed quality standards are maintained.
- d) To work with money advice caseworkers, assistants and trainees designated under your supervision to identify appropriate professional development objectives and training or other routes to meet those objectives.
- e) To hold money advice team meetings to update the team on trends, procedure, practice and training. Where the Money Advice Team Leader is not present to provide a copy of the meetings minutes.
- f) Be responsible for the line management of money advice caseworkers, assistants and trainees designated to you, specifically to include:
 - Supervision and appraisals
 - Authorising annual leave
 - Reporting issues to the Money Advice Team Leader relating to sickness, performance and timekeeping
 - Cascading information about training needs and opportunities between management and the team
- g) Investigate and respond to first stage complaints in line with SWLLC procedures.

All of these duties to be carried out in line with SWLLC procedures.

5. PROFESSIONAL DEVELOPMENT

- a) To attend courses on new legislation, specialist skills and the use of information technology.
- b) To keep up to date with the changes in relevant legislation passing on this information to other staff as necessary

- c) To read the relevant law journals
- d) To be appraised regularly and to engage fully in this process to further personal development and maximise your contribution to SWLLC.

6. SOCIAL POLICY

- a) To be alert at all times to the social policy implications of issues presented by clients.
- b) To take appropriate action to influence social policy in regard to these issues.

7. EQUAL OPPORTUNITIES

- a) To have regard at all times in the planning and execution of duties to SWLLC's Equality and Diversity Policy.

8. SPECIAL FEATURES

- a) In addition to the tasks and duties listed in this job description to undertake such duties as may be identified and which are generally compatible with the functions of the post.

Person Specification

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Responsible to:	Money Advice Team Leader
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Functional Links:	Senior Management Team, Board of Trustees, Team Leaders, Administrators
Hours:	35 hours per week
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Essential Experience & Skills

1. At least one year experience as a debt adviser providing debt advice as a qualified caseworker.
2. To either currently be a Debt Relief Order Intermediary or hold the Certificate in Money Advice Practice
3. Good GCSE passes in English and Maths grade B or above or equivalent qualification.
4. Good and demonstrate able customer services skills both face to face and over the telephone and other media. Ability to respond sensitively to clients from a variety of backgrounds that are under pressure and negotiate with third parties in order to minimise conflict.
5. Ability to meet stringent Debt Free Advice – Money and Pension Service funding specification and target client numbers and assist the adviser team to meet their targets
6. Ability to write detailed up to date case notes, letters and reports as required in plain English. Accurate typing speeds of at least 40 words per minute.
7. Ability to deal with client's advice needs face to face, over the telephone, via video, email, Skype, WhatsApp or outreach
8. Ability to manage a challenging caseload and prioritise work in the face of competing demands on your time.

9. Ability to research, understand and explain complex information both orally and in writing.
10. Practical knowledge of IT sufficient to use Microsoft Office applications including Word, Outlook and Excel to administer your own workload. Proficient use of Excel
11. Commitment to taking part in social policy, research or evaluation activities as required, for example by responding to surveys and identifying trends in your caseload
12. Commitment to undergo training and participate in other forms of professional development and cascade this to the service as necessary
13. Willingness to travel to outreach sessions as required within the boroughs of the employing organisation and in neighbouring boroughs as required for daytime and evening advice sessions.
14. Willingness to undertake evening and weekend work if required with prior notice.
15. Ability to work in our offices in Merton and Battersea on a regular basis
16. If wishing to work part of this post from home a suitable home environment to enable this to take place
17. Commitment to equal opportunities as set out in the principles and policies of South West London Law Centres

SOUTH WEST LONDON LAW CENTRES
Legal Action for Local Communities

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ORGANISATION SUMMARY AND OBJECTIVES OF THE POST

We are looking to recruit a highly-motivated and proactive caseworker to take responsibility for managing our busy and effective money advice team as part of our long running Debt advice project funded by Debt Free Advice.

The project aims to support all members of our community with free and non-judgmental debt advice so that they can take steps to improve their financial position. You will be familiar with the framework for providing debt advice and ideally will have some management experience so that you can hit the ground running.

SWLLC is a community based legal practice and a registered charity. Our history dates back to 1974 when the first Law Centres in Wandsworth were created. We became SWLLC in 2004 through the merger of a number of Law Centres in South West London. The law centre won the highly prestigious Legal Aid Firm/Not for Profit of the year 2020 at the LALY Awards.

SWLLC now works across six South West London boroughs (Croydon, Merton, Kingston, Richmond, Sutton and Wandsworth) helping people to understand and enforce their legal rights. In doing so, we address the root causes of social injustice – poverty, family breakdown, unemployment and exploitation. SWLLC provides full legal casework, representation and advice in the following areas of social welfare law – Community Care, **Debt**, Employment, **Housing**, Immigration & Asylum and in a limited way in Welfare Rights. We represent clients in all courts and tribunals. We also provide the housing duty solicitor schemes at Croydon, Kingston and Wandsworth County Courts giving emergency representation in possession hearings for rent and owned homes and at the warrant stage for evictions.

SWLLC delivers one of the largest pro bono clinic programs in the country, to provide initial advice on legal problems. There are 16 firms involved with the clinics as well as individual solicitors.

SWLLC works with and assists over 6,500 people per year.

You will initially be based in our Croydon office but may be moved to one of our other branch offices. The post will be involved in regular outreach.

SWLLC's Croydon Office is a short walk from either East or West Croydon stations.

SOUTH WEST LONDON LAW CENTRES
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GUIDANCE FOR APPLICANTS

Please read these notes carefully before filling in your application form, as the decision to shortlist for interview will be based solely on the information provided on the application form.

General Guidelines

1. Give only information, which is relevant to the post.
2. Complete all sections of the form. You will need to do this in order to be fairly compared to other candidates. All information given is treated as confidential.
3. Complete a rough draft first. This avoids mistakes and untidiness and enables you to organise and review the information you put on the form.
4. Get feedback from other people and make sure you give examples, which demonstrate your ability to do the job.
5. Complete the form in type, word processor, black ballpoint or ink.

Selection Criteria – The Person Specification

The skills, experience and qualification described in the Person Specification are the criteria against which you will be assessed and short-listed. Make sure you have covered each section of the Person Specification in your application form.

Employment

When completing this section include relevant part-time work or work taken on a voluntary basis. Outlining your previous work experiences or other responsibilities may help you to uncover relevant skills, which are clear signs of your ability to do the job.

Further Information

In section four of the application form you should try to show how you are able to do the job. Rather than simply repeating your career history, look at the skills and experience required for the job and provide evidence that you possess them. Concentrate on the things you know and what you can do rather than on what other people in your group or workplace can do.

References

Where possible at least one of your referees should be a previous employer; either you're present or most recent employer. If you have not previously been employed, or have not worked for some time, give the name of someone who knows you sufficiently well to confirm the information given and who can comment on your ability to do the job. (You must not provide a relative or partner's name as a referee).

Monitoring Information

This section is included in order to monitor the effectiveness of SWLLC's Equal Opportunities Policy, which aims to ensure that all applicants are treated fairly. All information is treated in confidence and used only for statistical monitoring.

The monitoring section of the application form is not used as part of the selection process. Consequently, if for example you have a disability, and this is an item in the person specification, **do also mention it in the main part of your application form.**

Finally – take a copy of the form and keep it to remind yourself of what you have said if you are called for an interview. Good Luck!