

Our ref: PM
Date: September 2023

Dear Applicant

Part Time Money Advice Caseworker (Trainee)

Thank you for your interest in this post to work in our Croydon office.

I am pleased to enclose:

1. Job Description and Person Specification for Debt Caseworker
2. Organisation Summary

Note that for this role, we will accept applications from Trainees and from those who do not currently have experience as a debt adviser. Full training will be provided.

You can apply to us by submitting a completed application form which you can find [here](#).

Applications will close when we have recruited the successful candidate. Applications should be sent by email to recruitment@swllc.org.

Yours faithfully

Patrick Marples CEO
South West London Law Centres

SOUTH WEST LONDON LAW CENTRES
Legal Action for Local Communities

JOB ADVERT – Trainee Money Advice Caseworker

South West London Law Centres (SWLLC), one of the largest and most progressive Law Centres in the country, is seeking replace an existing money advice casework post

There is considerable demand for the work of the law centre. We get over 60,000 calls for assistance each year and 7500 people are helped through services delivered by SWLLC. We help people at some of their most difficult times of their lives to resolve their legal problems. As part of a small team of case workers and volunteers you will to resolve client's money advice issues through a mixture of casework and guided advice as part of the London- wide Debt Free Advice project funded by the Money and Pensions Service

POST: Trainee Money Advice Caseworker

Salary: £25,068 per annum pro-rata 4 days per week (actual pay £20,055)

Reports to: Money Team Manager, Senior Money Advice Caseworker

Line Manages: Volunteers assigned to the project

Functional Links: Board of Trustees, CEO, Deputy CEO, Head of Legal Practice, Finance Manager, Team Leaders, Branch Administrators

Term: Permanent (subject to grant funding with the funder - Debt Free Advice)

Hours: Part time, four days per week

Based at: Merton with travel to our other SW London offices and outreach locations as required

The post is available for immediate start. If you would like to discuss the post further, please email recruitment@swllc.org.

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JOB DESCRIPTION

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Key Tasks

- 1 To provide a targeted debt and money advice service to clients in accordance with the Debt Free Advice- Debt Advice Partnership under funding from a Money and Pensions Service programme. The provision of the service will be face to face and also via video, telephone, email, WhatsApp and web access.
- 2 To be part of a team including volunteers to provide advice to around 1650 people per year.
- 3 If you are recruited as a Trainee, we would expect you to achieve your qualification as a debt adviser within three months of commencing the role.

Duties & Responsibilities

- 4 To meet the performance targets set by Debt Free Advice and through the Money Team Manager.
- 5 To ensure that all advice, assistance and representation complies with the requirements of our Lexcel quality mark

- 6 To ensure all work is recorded within the Debt Free Advice framework. Ongoing casework will be recorded through the Advice Pro case management system. The post holder will be expected to meet Debt Free Advice performance targets.
- 7 To participate in team meetings and to carry out file reviews in accordance with Lexcel requirements.
- 8 Produce files for Debt Free Advice to review and score an average quality score of 85% or higher under the Debt Advice Peer Assessment Scheme (DAPA) as required
- 9 To participate in team and staff meetings.
- 10 To be responsible for your own word processing, filing and case recording within the Debt Free Advice framework and the Advice Pro case management system.
- 11 To advise and provide training and talks to Law Centre staff and volunteers and to front line advice agency staff within the Law Centre's catchment area as necessary
- 12 To attend coordinating bodies as required.
- 13 To share the work of maintaining everyday necessities.
- 14 To provide cover for colleagues during absences.

Advice & Casework

- 15 Provide casework face to face, via telephone, video, Flex, email and outreach
- 16 Provide the full range of advice activities to assist clients with debt advice and income maximisation problems, breathing space, including those with multiple debts, both priority and non-priority owed to commercial and statutory creditors.
- 17 Deal with contentious and complex debt advice problems, including mortgage and rent arrears re-possession cases, bankruptcy proceedings, and Consumer Credit Act disputes.
- 18 Prepare cases and support clients, where appropriate, at County Court, Valuation Tribunals and Magistrates Court as well as assisting clients who are self-representing.
- 19 Advise on and assist with income maximisation issues, including assisting with benefit and tax credit claims and associated problems.
- 20 Identify other debt/income maximisation social welfare advice needs and signposting or making referrals to other agencies where necessary.
- 21 Keep up to date, accurate and detailed case records.
- 22 Complete statistical information records fully compliant with organisational: Debt Free Advice and Money and Pensions Service requirements.
- 23 To assist other teams in the Law Centre in helping clients resolve any debt and money advice matters

Project Record Keeping and Reporting

- 24 Maintain relevant client databases and produce monthly returns to Debt Free Advice – in accordance with Debt Free Advice and Money and Pensions Service requirements
- 25 Search for and collect missing data to enable monthly return to Debt Free Advice and Money and Pensions Service
- 26 Work with the Team Leader to provide monthly case studies and follow up clients to develop profiling reports and data
- 27 Assist with the development and maintenance of a database of standard documents - wording to aid in the efficiency of delivery of money and debt advice

Training and professional development

- 28 Attend relevant training courses and appropriate internal and external meetings, to enhance skills as a money advice caseworker. Undertake and pass core training programme to become a debt specialist through the MIMA qualification and a Debt Relief Order intermediary
- 29 Consult relevant colleagues to ensure that working practice is consistently of a high quality.
- 30 Keep up to date with all relevant current legislation and policy and share knowledge with colleagues
- 31 Provide feedback to trainers and own manager or supervisor on the effectiveness of informal and formal learning activities
- 32 Take part in regular supervision meetings with team leader and other caseworkers and obtain informal support as necessary.
- 33 Take on and competently progress a money advice caseload reflective of the post holder's money advice casework experience
- 34 To be appraised regularly and to engage fully in this process to further personal development and maximise your contribution to SWLLC.

Supervision and Support

- 35 Supervise your own volunteers and file/peer review of colleagues.
- 36 Oversee and monitor volunteer advice sessions to provide money and debt advice.
- 37 Assist with the Volunteer and Pro Bono Coordinator in maintaining a cadre of volunteers to assist with all aspects of money and debt advice and including the administration of this project.

Service Development

- 38 Take part in service planning activities to help ensure relevant elements of the Debt Free Advice project meet project targets.

- 39 Take part in activities to raise the profile of the organisation's Debt Free Advice services.

Social Policy

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

Equal Opportunities

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

Other Duties

- 43 Play a full role in the organisation supporting colleagues to maximise their effectiveness.
- 44 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.

Working Hours

- 45 This post requires some evening and weekend work across South West London.

Location

- 46 South West London Law Centres is made up of 3 branches based in Wandsworth, Croydon and Merton. You may be required to work at any of our 3 offices although mainly at our office in Merton. You will also be expected to undertake outreach sessions at other locations in our catchment area.

SOUTH WEST LONDON LAW CENTRES

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PERSON SPECIFICATION

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Essential Experience & Skills

1. If you have experience as a debt adviser, we require at least six months of experience providing debt advice either as a trainee or as a qualified caseworker.
2. If you do not have experience as a debt adviser, we require at least 12 months of experience in a customer service environment.
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. Each full-time caseworker with volunteer support is expected to deal with over eight new clients per week.
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.
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. Commitment to equal opportunities as set out in the principles and policies of South West London Law Centres

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ORGANISATION SUMMARY AND OBJECTIVES OF THE POST

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

In the last year much of the work of the law centre was carried out remotely. All our offices are now open with staff working a mixture of remotely and in the office. The Debt Team has a target to see all new money advice clients either face to face or via the video conference system FLEX.

SWLLC helps over 7,500 people each year

We now work 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 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 has a long history of using volunteers since 1977 and our first pro bono clinic started in 1982 in conjunction with a local Citizens Advice Bureau. In 1986 the first clinic run by an individual firm started with Simmons & Simmons. SWLLC delivers pro bono clinics across each week to provide initial advice on legal problems concerned with Crime, Criminal Injury, Consumer, Employment, Family, General Litigation, Housing, Immigration, Inquests, Motoring Offences, Personal Injury, Small Claims and Wills & Probate. The overarching aim is to empower clients by encouraging them to take steps to resolve their problems themselves but advisers may also carry out a limited amount of follow-up work such as drafting documents or writing letters on clients' behalf. The work is important because addressing legal problems in their early stages can prevent them from escalating into bigger, more complex problems. Around 4,000 people are assisted each year. We estimate in any one year over 400 volunteer lawyers will help with our clinics. There are 16 firms involved with the clinics as well as individual solicitors.

Context of the Post

We have a small friendly debt team currently 6 caseworkers that already helps 1804 people per year. We have one debt intermediary in our team with 2 more due to qualify early next year, and we have a strong emphasis on quality in our work. We are looking for qualified caseworkers. Alongside the debt team we have a Crisis Navigator and Welfare Benefit project to link the court work of the housing team with the debt team providing holistic support to those at immediate risk of losing their homes.

Our Croydon Office is a short walk from either East or West Croydon stations. There is no parking available on site but a parking scheme 10 minutes walking away at the local shopping centre which costs £3.50 per day.