

Money Adviser

Background

Auriga Services is a dynamic, fast growing not-for-profit organisation with a vision to support 2 million people who are experiencing financial hardship. With a track record spanning 21 years, we are mature enough to provide outstanding service through the application of extraordinary levels of skills and experience. We manage combined annual funds of over £15 million helping people alleviate their debt and realise income and benefits that make a real difference to the quality of their lives.

We achieve all this through the administration of charitable trust funds for water company customers, and income realisation for local authority residents and patients within the NHS. We are seeking exceptional people with passion, enthusiasm and ability to join and make our mission a reality.

We enjoy a generous holiday allowance, good pension, and a great working environment.

Job Description

We are looking to recruit a Money Adviser to join our Welfare Rights and Debt Advice Service.

As part of a busy multi service team, you will play an important role in providing an effective and efficient service with a focus on valued outcomes. You will work within the aims, principles and policies of Auriga's vision and towards Advice Quality Standard (AQS) requirements. As a national service, you will be confident in delivering support via telephone, email and post. Some outreach and home visits may be required.

The successful candidate will provide a money advice service to clients offering support and advice in income maximisation, financial capability, energy comparison, debt and welfare benefit advice. As part of the welfare and debt advice team, you will be expected to support the team in all aspects of the service to ensure a quality service to clients whilst meeting the demands, targets and service level agreements of the team.

The successful candidate will be required to attend roadshows delivering presentations and advice services to our partners, this may include travel and occasional overnight stays.

Salary: £22,000 - £25,000 Starting salary based on experience

Hours: 37.5

Main Duties and Responsibilities

Role responsibilities will include but are not limited to:-

1. Advice work

- ★ Actively encourage take up from clients referred through to the service from both internal and external sources.
- ★ Develop and manage interviews with clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s)
- ★ Establishing and providing appropriate levels of money advice and support including:
 - Income Maximisation including welfare benefit identification and application
 - Providing guidance with budgeting, liability and banking issues
 - Identification and assistance with applications to grants and trust funds
 - Liaising and negotiating with third parties, including statutory and non-statutory organisations as required
 - Acting for the client wherever necessary to facilitate debt relief options to include form filling, drafting or writing letters and telephoning
 - Supporting clients to plan, implement, and review action
 - Provide continuing support to clients where necessary
 - Enabling clients to act on their own behalf and empower them to set their own priorities
- ★ Refer to relevant legislation and case law as required
- ★ Explore options and implications so that the client can make decisions

2. Casework / Administration

- ★ Manage money advice cases to include;
 - Maintaining detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and quality assurance
 - Open, maintain and record sufficient cases in order to meet the agreed requirements

- Use information and communication technology systems for statistical and case-recording, record keeping and document production

3. Social Policy and Monitoring

- ★ Influence changes to legislation, policy or practice by assisting with social policy work. This includes identifying issues as they arise and submitting the relevant information and evidence

4. Professional Development

- ★ Keep up to date with legislation, case law, policies and procedures and undertake appropriate training as and when required
- ★ Attend relevant internal and external meetings as agreed with the Team Manager
- ★ Read relevant publications
- ★ Prepare for and attend monthly supervision sessions
- ★ Ability to identify own training needs and proactively work to completing annual CPD accreditation.

5. General

- ★ Ensure that all work conforms to the required systems and procedures
- ★ Uphold the aims and principals of Auriga Services and its equal opportunities policies
- ★ Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- ★ Carry out any other related tasks required to ensure the smooth running of the service provision
- ★ Assist the Team Manager and other Auriga team members when required
- ★ Carry out other duties commensurate with the post as required

Person Specification

We are looking for a dynamic, versatile individual who has the capability to actively participate in the development and promotion of Auriga's Debt Advice Service.

It is essential that applicants for this role have:

★ Experience in the provision of Money Advice:

2 years previous full time (or part time equivalent) experience as Money Adviser or Debt Adviser

On-going Money Advice experience and IMA Money Advice Accreditation status (Certificate in Money Advice Practice)

★ The ability to deal with all enquiries promptly and proactively, resolving the situation as far as possible, exercising judgement on when an enquiry needs to be referred to the senior or Team Manager

★ Ensure efficiency and best practice is adhered to at all times and service level agreements are met

★ Ability to monitor and maintain own quality standards

★ Ability to monitor and maintain own performance targets and those of the team

★ Knowledge of the legislation relating to Money Advice

★ Ability to research, analyse and interpret complex information

★ Ability to identify own training needs, a commitment to keeping knowledge up to date and the willingness to learn and develop new advice skills where necessary, adhere to the IMA CPD scheme.

★ To work as part of the team effectively meeting all objectives and targets.

★ To understand the importance of team work and be able to work both independently and as a valued team member

★ Comply with the requirements of the Data Protection Act and co-operate in measures introduced to comply with this legislation.

★ Be required to hold an enhanced disclosure barring certificate

It is desirable that applicants for his role have:

★ Experience of the DRO process as an approved intermediary

★ A good working knowledge of welfare benefits and charitable trust funds

★ Basic knowledge of services provided by the NHS and social care services

The person required for this role is expected to have:

- ★ Understood, and empathise with, the aims and principles of the service and its equal opportunities policies
- ★ Understanding of the issues effecting society which contribute to the increase in personal debt problems
- ★ Ability to work under pressure and to plan and prioritise as necessary
- ★ A flexible approach and ability to work as part of a team
- ★ Excellent written and spoken English and ability to communicate at all levels with particular emphasis on negotiating
- ★ Proficient IT skills

JOB APPLICATION FORM

POST: Money Adviser

CLOSING DATE: 31st October 2019

HOW TO COMPLETE THE FORM

- Please ensure you address all parts of the person specification relating this to the job description provided.
- Provide examples of your experience to demonstrate how you meet the requirements of the role.
- The supporting statement is your opportunity to give us details of your skills, knowledge and experience. It is important information used to short-list suitable candidates.
- You may include a CV, however, only your responses on this application form will be considered when scoring your application.

Completed forms to be returned by 31st October 2019 at 5pm via post or email to kwootton@aurigaservices.co.uk

Auriga Services
Emmanuel Court
12-14 Mill Street
Sutton Coldfield
B72 1TJ

| PERSONAL DETAILS | | | |
|--|--|----------------|----|
| Full Name: | | | |
| Address: | | | |
| | | | |
| Post Code: | | Tel No: | |
| | | | |
| Mobile: | | Email address: | |
| IMA Accredited | | YES | NO |
| Full Drivers Licence | | YES | NO |
| DRO Intermediary | | YES | NO |
| What period of notice does you current contract require? | | | |

Referees:

Please name two referees who can comment on your experience and qualifications for the job. One reference should be (where possible) from your present or most recent employer. Your referees may be approached if you are shortlisted for interview.

References:

| | | | |
|------------------------------------|--|---------|----|
| Name of Referee: | | | |
| Position / Profession: | | | |
| Address: | | | |
| | | | |
| | | | |
| Post Code: | | Tel No: | |
| Email Address: | | | |
| Can be contacted before interview: | | Yes | NO |
| | | | |
| Name of Referee: | | | |
| Position / Profession: | | | |
| Address: | | | |
| | | | |
| | | | |
| Post Code: | | Tel No: | |
| Email Address: | | | |
| Can be contacted before interview: | | Yes | No |

Employment History:

Please give details of your employment history, starting with your current / most recent position.

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|---------------------------|-------|------------|-----|
| Present/previous employer | | | |
| Address | | | |
| | | | |
| Post Code: | | Job Title: | |
| Duties: | | | |
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| Dates Employed: | From: | | To: |
| Salary: | | | |
| Reason for Leaving: | | | |
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| Previous employer | | | |
| Address | | | |
| | | | |
| Post Code: | | Job Title: | |
| Duties: | | | |
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| Dates Employed: | From: | | To: | |
| Reason for Leaving: | | | | |
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| Previous employer | | | | |
| Address | | | | |
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| Duties: | | | | |
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| Dates Employed: | From: | | To: | |
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| Dates Employed: | From: | | To: | |
| Reason for Leaving: | | | | |
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| Previous employer | | | | |
| Address | | | | |
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| Post Code: | | Job Title: | | |
| Duties: | | | | |
| | | | | |
| Dates Employed: | From: | | To: | |
| Reason for Leaving: | | | | |
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STATEMENT IN SUPPORT OF APPLICATION

Within this section please explain how you meet the requirements of the person specification for the job role.

Please limit your statement to no more than 1500 words.

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PERSONAL HISTORY:

Please write a supporting statement to tell us why you applied for this job and why you believe you are the best person for the job?

Education and Training:

Please list any education and / or training (including short courses) that you have undertaken, including grades:

Criminal convictions

| | | |
|---|-----|----|
| Have you had any previous convictions not regarded as spent under the Rehabilitation of Offenders Act 1974? | | |
| | Yes | No |

If YES please provide details of the offence and the date of conviction.

Please note: To ensure the safety of our clients, Auriga requires that all staff who may have direct access to clients, where any part of the work is primarily targeted at legally defined vulnerable adults or children, have their criminal records checked. However, we are committed to the promotion and delivery of equal opportunities and the rehabilitation of ex-offenders.

All offences, other than sexual crimes against a child or vulnerable adult, will be treated on an individual basis taking into account issues such as the risk to the client, the circumstances of the offence (e.g. what it was, is it relevant to role, how long ago it was) and the reputation of Auriga.

Data Protection Act 1998 and the General Data Protection Regulation 2018

As part of the recruitment procedure we may collect and store sensitive personal data about you. We are required by law to obtain your consent to such data being recorded. It is our policy to store data relating to recruitment procedures for 12 months after the date on which it is submitted, for internal auditing purposes. Any information of this nature will be treated confidentially.

- I declare the information given on this form is correct to the best of my knowledge.
- I acknowledge that by completing this form, I am giving Auriga Services Limited consent to use and store your sensitive personal information for the purposes of recruitment.
- I understand my sensitive person information will be stored by Auriga Services Limited for a period of 12 months.

| | |
|------------|--|
| Signature: | |
| Print: | |
| Date: | |

WHAT HAPPENS NEXT?

- Once the vacancy has closed, we will shortlist all completed application forms against the Person Specification.
- We will contact you to tell you if you have been short-listed as soon as possible after the closing date.
- The interview will normally consist of an exercise followed by a formal interview. We will confirm the format in the letter inviting you to interview.

Thank you for your interest in this role, if you have not heard from us after two weeks of the closing date, please assume your application has been unsuccessful.

