**Recruitment Pack**

**Money Adviser**

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**Covering Letter**



November 2024

Dear Applicant

**Post of Money Adviser**

Thank you for your enquiry for the post of Money Adviser with the Western Isles Citizens Advice Service (WICAS).

You will find enclosed an application form and job description. There is also some background information about the service.

In determining which applicants will be interviewed the Interview Panel will have regard to applicants who best fit the job description, so it is important that you use this as a guide when completing the application form.

We look forward to receiving your application by the closing date of **Thursday 12th Decembe**r at **5pm** and we would ask that you provide an email address and telephone number where we can contact you day and/or evening.

Yours faithfully,



**Lynda MacLean**

**CEO**

**Organisational Profile**



Western Isles Citizens Advice Service is the major provider of information, advice and assistance in the Western Isles.

We are staffed by trained volunteer and project advisers under the supervision of the management team and provide responses to clients’ enquiries covering the whole range of social issues. Despite being a generalist service, most enquiries are concerned with matters related to problems of poverty and deprivation.

We cover the whole of the Western Isles with offices in Stornoway, Tarbert, Liniclate and Castlebay, core funding is received from Comhairle nan Eilean Siar. We are an autonomous body under the control of a local Board of Directors.

We are members of Citizens Advice Scotland (the Scottish Association of Citizens Advice Bureaux) and, as such, must meet specific conditions of membership related to standards of service and other matters.

Enquiries are across a wide range of fields, and clients expect high quality advice and assistance on what are, at times, highly complex matters. The main enquiries at the present time relate to problems with benefits and money; debt; energy; housing; and family and personal situations.

*Charity Name: Western Isles Citizens Advice Service*

*Charity Number: SC015018*

**Job Description**



**Job Title:** Money Adviser

**Responsible to:**  Service Co-ordinator

**Responsible for:** Debt advice and casework across the Western Isles

**Location:** Lewis Citizens Advice Bureau, Stornoway, Isle of Lewis

**Hours:** 21 hours per week

**Type of Contract:** Permanent contract

**Salary:** £26,130 (pro-rata) per annum plus £2,742 (pro-rata) Island Allowance + 6% pension contribution

The Money Adviser will share responsibility for debt advice and casework across the Western Isles.

Certified training and peer support will allow the post holder to attain and maintain the essential accreditation to give debt advice in Scotland and facilitate Scottish debt options for clients. Applicants who already hold accreditation are welcome to apply.

**Summary of main responsibilities:**

* Advise on debt and assist clients to follow through with their preferred option for dealing with debt, liaising with creditors where appropriate
* Assist with income maximisation and explore budgeting and money-saving measures with clients
* Ensure that ongoing cases are progressed timeously and promptly recorded

**General Responsibilities:**

* Uphold the Aims and Principles of the CAB service
* Ensure that advice complies with quality audits for both Citizens Advice Scotland and Scottish National Standards Type iii.
* Maintain the Money Advice caseload in line with FCA requirements.
* Ensure client confidentiality through the compliance with the relevant legal obligations such as GDPR.
* Ensure that client records are accurate, legible and complete including entries for social policy submissions
* Undertake administrative tasks in relation to casework and ensure that these are undertaken efficiently and timeously
* Maintain accurate statistics of client enquiries
* Participate in on-going training and identify further training needs
* Ensure compliance to all WICAS policies and procedures, including health and safety guidelines and share responsibility for own safety and that of colleagues.

**Other duties and responsibilities**

* Represent WICAS at local level as required
* Undertake preventative work by developing materials, providing outreach services and preparing social media content and press releases
* Liaise with other third sector organisations and stakeholders
* Carry out any other reasonable task as required by the Service Co-ordinator or CEO

**Person Specification**



|  |  |  |
| --- | --- | --- |
|  | **ESSENTIAL** | **DESIRABLE** |
| **QUALIFICATIONS** | * Good standard of general education. | * Evidence of vocational training and/or qualification * Certification in advice work |
| **EXPERIENCE** | * Experience in working closely with members of the public * Experience of record keeping | * Experience in working with volunteers * Experience in preparing and delivering outreach activities * Experience of casework and/or working in an advice setting * Experience of advocating on behalf of an individual to a third party |
| **SKILLS AND**  **ATTRIBUTES** | * Excellent literacy, numeracy and IT skills, displaying a high level of accuracy and attention to detail * Ability to work without close supervision, prioritise tasks and meet deadlines * Ability to work effectively in a team * Ability to show empathy and to communicate effectively with clients and with third parties | * Gaelic speaker * Knowledge of the local area and other Third Sector organisations * Awareness of the use   Social Media |
| **KNOWLEDGE** | * An understanding of, and commitment to, the principles and aims of Citizens Advice Scotland. * An understanding of the importance of statistical gathering for service evaluation | * Awareness of debt issues and Money Advice options in Scotland * Understanding of Income Tax and Council tax systems * Knowledge of the benefits system: DWP and SSS. |
| **OTHER** | * Have a willingness to train to become a certified Money Adviser and commit to further training to grow skills and knowledge * Valid driver’s licence * Willingness to travel within the Western Isles as required by the job * Ability to work hours flexibly as required by the needs of the service * Current PVG scheme disclosure or ability to acquire one. |  |

**Application Form**



To apply for this role, please complete this application form and send it to

Lynda MacLean

Western Isles Citizens Advice Service

Uist Citizens Advice Bureau

Liniclate

Isle of Benbecula

HS7 5PJ

Or by email to

[lynda.maclean@wicas.uk](mailto:lynda.maclean@wicas.uk)

In order for your application to be considered, please ensure you complete all sections of this form. Please do not send in your CV as we will only consider your completed application form.

**Sections**

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# Candidate Details

Please complete your details below:

|  |  |
| --- | --- |
| Title |  |
| Full name |  |
| Previous name(s) if applicable (please include dates) |  |
| Address |  |
| Email address |  |
| Contact telephone number |  |
| Role applied for | Money Adviser |
| Where did you see the job advertised? |  |

# General Data Protection Regulation

The Western Isles Citizens Advice Service is aware of its obligations under the General Data Protection Regulation (GDPR) and is committed to processing your data securely and transparently. Our Privacy Notice for Job Applicants sets out, in line with GDPR, the types of data that we collect and hold on you as a job applicant, how we use that information, how long we keep it for and other relevant information about your data. A copy of the privacy notice for job applicants can be found attached. It is important that you read this notice so that you are aware of how and why we are using your data. Please check the box below to confirm that you have done so.

**I confirm that I have read, understood and agree to the Privacy Notice for Job Applicants.**

# References

Any offers of employment with The Western Isles Citizens Advice Service are conditional upon receipt of satisfactory references. Please provide below the names and contact details of at least two referees **covering your last 5 years of employment** (include additional boxes if necessary).

If you have been in full-time education during this time, please provide details of where an academic reference can be obtained.

For each reference, please detail the following information:

**Referee 1**

|  |  |
| --- | --- |
| **Name of referee** |  |
| **Job title of referee** |  |
| **Organisation** |  |
| **Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed** |  |

**Referee 2**

|  |  |
| --- | --- |
| **Name of referee** |  |
| **Job title of referee** |  |
| **Organisation** |  |
| **Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed** |  |

Please note that we will not contact any referees until an offer of employment has been made and your authorisation has been obtained.

# Right to Work in the United Kingdom

All employees must be able to demonstrate that they are legally entitled to work in the United Kingdom.

In order to apply for employment with the Western Isles Citizens Advice Service, you must declare that you have the right to work in the United Kingdom and that, if successful, you will be able to provide the necessary documentation (typically a passport or a birth certificate, together with your National Insurance Number).

By completing this application form, you are declaring that you are legally entitled to work in the United Kingdom.

**Please state below, by selecting the statement that applies to you, if there are any restrictions or limitations on your legal right to work in the United Kingdom.**

|  |  |
| --- | --- |
|  | I confirm that I have the right to work in the United Kingdom without restriction. |
|  | I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_\_\_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I have no restrictions or limitations on my Visa. |
|  | I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_\_\_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I am restricted to (please detail any restrictions or limitations on working in the UK):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

# Employment History

Please give details of your employment (paid or unpaid) starting with your present/most recent employer and working backwards. Please explain any employment breaks.

**Present or most recent employer:**

|  |  |
| --- | --- |
| Name, full address & telephone number of employer |  |
| Job title |  |
| Dates employed: from (MM/YY) to (MM/YY) |  |
| Final salary |  |
| Notice period (if applicable) |  |
| Reason for leaving |  |

Please give a brief outline of your main responsibilities and achievements:

**Previous employers: Continue on separate sheet and include additional boxes if necessary**

|  |  |
| --- | --- |
| Name, full address & telephone number of employer |  |
| Job title |  |
| Dates employed: from (MM/YY) to (MM/YY) |  |
| Notice period (if applicable) |  |
| Reason for leaving |  |

Please give a brief outline of your main responsibilities and achievements:

|  |  |
| --- | --- |
| Name, full address & telephone number of employer |  |
| Job title |  |
| Dates employed: from (MM/YY) to (MM/YY) |  |
| Notice period (if applicable) |  |
| Reason for leaving |  |

Please give a brief outline of your main responsibilities and achievements:

If you have had any breaks in your employment (for example family commitments, travel and periods of unemployment) please give the dates to and from and a full explanation.

|  |  |
| --- | --- |
| **Dates** | **Reason for break** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Qualifications

Please give details of your qualifications below, beginning with the most recent.

**Education:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Dates** | **Institution name** | **Qualification** | **Grade** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Membership of professional bodies:**

|  |  |  |
| --- | --- | --- |
| **Date joined** | **Professional body** | **Category of membership** |
|  |  |  |
|  |  |  |
|  |  |  |

**Additional qualifications:**

|  |  |  |
| --- | --- | --- |
| **Date completed** | **Course** | **Brief description** |
|  |  |  |
|  |  |  |
|  |  |  |

# Written statement

In this section we would like you to give your reasons for applying for this post. Bearing in mind the job description, please provide examples demonstrating what experience, skills and qualities you would bring to this job. Your statement should not be longer than one page.

# Declaration

I confirm that the information given on this form is, to the best of my knowledge, true and complete. I understand that any deliberate attempt to provide false information to obtain employment is a serious misrepresentation and will lead to rejection, or if employed, dismissal and is likely to constitute a criminal offence.

Signed:

Date:

Print name: