



Money Advice Caseworker - Trainee or Qualified

Job pack

Thank you for your interest in working at Citizens Advice Bristol. This job pack should give you everything you need to know to apply for this role when full training following the MaPS training pathway has been successfully completed and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice.
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact by emailing Thomas Govan, Debt Team Supervisor, thomas.govan@citizensadvicebristol.org.uk

We are seeking someone who is passionate about giving an effective service to those most in need. You will need to demonstrate that you are a strong team player, with an eye for detail, and have great people skills. You will thrive in a busy environment and have a positive 'can do' attitude.

The post holder will provide, as part of the project team, a comprehensive debt advice service by assisting clients to achieve the best outcome for their

circumstances. The role requires carrying out Debt Assessments, maximising income, preparing budgets and providing debt options, along with signposting/referring or carrying out casework/advocacy for clients based on their individual needs and situation.

How to apply

Please read our Guidance notes for applicants on the website before filling in your application. Once you are ready to apply please fill in the web application form on the website.

Closing date for applications **5pm 16th October 2026**

Our values

We're inventive. We're not afraid of trying new things and we learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

3 things you should know about us

1. We're local and we're national. We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.

2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

How Citizens Advice Bristol works

We deliver advice and support to thousands of people every year. We do this by providing the following services, delivered between volunteers and paid staff.



Adviceline – freephone telephone advice service providing first response.



In-person Advice – face-to-face advice delivered at a variety of locations



Email advice – ensures that people who cannot call or visit receive the same quality of advice.



Outreach Services- we deliver from various locations in the city, including Foodbanks, Southmead Hospital, Welcoming Spaces and Bristol ReStart.



Equality, Diversity and Inclusion – We apply core values of dignity, respect, equality and non-discrimination, based on our common humanity. We seek to foster empowerment and participation at all levels.



Research & Campaign work – we collect evidence of the issues facing our clients and groups within the community, and we use this evidence to challenge unfairness and influence decision makers at local, regional and national level.



Dedicated Projects - As well as our open access service, which anyone can access about any issue, we also work in partnership with local and national partners to deliver a number of additional specialist funded services. These are primarily delivered by paid staff, and are listed below:

East Bristol and North Bristol Foodbanks: support to people who need foodbank help including budgeting, debt, and exploring other charitable support.

Macmillan Money & More: provides benefit advice and Macmillan grant applications to people affected by cancer.

Multiple Sclerosis Access-to-Advice: provides advice and information on any subject to those affected by MS.

Money and Pension Service (MaPS) funded debt advice: providing holistic debt advice and income maximisation.

Cost of Living project: delivered in the city's Welcoming Spaces, this service provides information to those affected by the cost of living crisis.

Overview of Citizens Advice nationally

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

This role sits our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.

How Citizens Advice Bristol works

We are an independent local charity that provides free, impartial, confidential advice, information and support to anyone in Bristol and provide access to justice for all. We are a member of National Citizens Advice. We dealt with over 29,000 issues in the 2025/26 financial year.

We provide free confidential advice online, over the phone and in-person. We give people the knowledge and confidence they need to find their way forward, whoever they are, whatever their problem. Our services range from information through to fully supported casework.

We cover all subject areas with a focus on welfare rights, debt, housing and employment. We deliver targeted services to particularly disadvantaged groups and in the most deprived areas. We use evidence from our clients to raise awareness about the issues that adversely affect people's lives. You can find out more about us via:

- Take a [look at our about us information on our website](#)
- Take a look at the [national Citizens Advice website](#) and the [Citizens Advice Campaigning site](#).



The role

Job title:	Money Advice Caseworker (Trainee or Qualified)
Reporting to:	Advice Services Manager
Base:	Main office - 48 Fairfax Street Bristol BS1 3BL with travel to outreaches
Reporting to:	Advice Services Manager
Responsible for;	None
FTE	0.8 FTE (28 hours per week Monday to Thursday)
Salary	FTE £27,000 per annum (pro rata), rising to £30,755.52 when qualified (pro rata)



Role profile - Qualified caseworker

Key accountabilities	Key elements & tasks
Money Advice Casework	Work in a target based project to provide advice and casework covering the full range of debt issues including; dealing with emergencies, making use of the debt respite scheme (Breathing Space) making offers of repayment, establishing liability, drafting financial statements, challenging creditors and budgeting advice.
	Interview clients using sensitive listening and questioning skills in order to allow clients the opportunity to explain their problem(s) and empower them to set their own priorities.

	Carry out income maximisation activities through the identification of appropriate welfare benefits and other financial assistance.
	Assist clients in the creation of realistic and sustainable budgets and developing financial capability skills.
	Advise and assist clients with debt solutions, including offers of repayment, Debt Relief Orders and Bankruptcy.
	Assist clients with other related problems where they are an integral part of their case, and refer to other in-house advisers or specialist agencies as appropriate.
	Act for the client where necessary and communicate with third parties to progress a case.
	Explore options and implications of advice to enable the client to make informed decisions, using appropriate accredited information sources.
	Provide support and advice to empower clients to act on their own behalf, where appropriate
	Maintain case records for the purposes of continuity of casework, information retrieval, statistical monitoring and to meet required quality standards
	Ensure advice is provided in accordance with contractual requirements and cases are recorded accurately and in a timely manner.
	Provide quality advice to clients, ensuring that all advice and casework conforms to the Citizens Advice Quality of Advice and Money and Pensions Service requirements and follows organisational procedures.
	Meet your individual volume targets as set, by your line manager, in line with funder requirements and comply with any instructions to change targets or reporting requirements.

	Advise MaPS Team Leader of any risks or issues that impact delivery of service of meeting set targets
Research and Campaigns	Contribute to both local and national campaigns where appropriate
	Raise and submit evidence forms where client circumstances fit with campaigns
	Raise with clients (after consultation with Team Leader) the possibility of their involvement in campaigns
Working as part of a team	Be an active member of the wider team, acting and support colleagues in a collaborative way
	Offer support to volunteers when carrying out debt work
	Work with colleagues to maintain a positive working and learning environment, in which equality and diversity are valued and dignity at work is upheld.
	Promote best practice across the team
Performance and Personal Management	To comply with operational management systems of supervision, objectives, appraisal and induction
	Attend relevant internal and external meetings as agreed with the line manager.
	Prepare for and attend supervision sessions/team meetings/management team meetings as appropriate
Service Development	To assist with the development of the service locally, regionally and nationally, publicising work as and when necessary
	Carry out other tasks within the scope of the post to ensure the effective delivery and development of the service

Training Trainee Qualified Caseworker	Completing all Skillbook and Wiseradviser training as set out in the MaPS Accredited Debt Learning Pathway. Successfully completing, within a reasonable period, any further modules, tasks, assessments and observations as defined by the MaPS Debt Supervisor and Advice Services Manager.
	To identify your own training needs in conjunction with your line manager and be prepared to undertake appropriate training.
	Keep up to date with legislation, case law, policies and procedures relating to specified areas.
	Undertake all relevant/required training to comply with contractual requirements.
Other duties and responsibilities	Liaise, as appropriate, with relevant outside agencies (voluntary and statutory), other Local Citizens Advice offices and other stakeholders
	Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
	Abide by and assist in the implementation of organisational policies and procedures including Health and Safety, IT, information assurance and equalities and diversity policies.
	Promote the aims and principles of the Citizens Advice service and comply with all published organisational policies and procedures
	Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.



Person specification -

Essential - Qualified Caseworker

- Experience, within the last 2 years, of providing debt advice working to Advice Quality Standards.
- Completion of MaPS accredited debt pathway to Advice and Casework level.
- Ability to empower clients experiencing debt problems through the provision of empathetic information, advice and casework to help improve people's quality of life.
- Experience of taking responsibility to prioritise own work, meet deadlines and manage a caseload to ensure that all targets are met.
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- Experience of taking responsibility to prioritise own work, meet deadlines and manage a caseload to ensure that all targets are met.
- Ability to research, analyse and interpret complex information and produce clear advice to empower clients to find a way forward.

Essential - Trainee and Qualified Caseworker

- Effective communication and interpersonal skills with particular emphasis on negotiating, representing and preparing reports and correspondence.
- Experience of listening and questioning with an ability to manage challenging situations in a calm, sensitive and effective manner.
- Ability and willingness to work both individually and as part of a collaborative proactive team.
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- Ability and willingness to work both individually and as part of a collaborative proactive team.

Desirable - Qualified Caseworker

- Accredited by CITA (or another Competent Authority) as an Approved Intermediary for Debt Relief Order purposes

Desirable - Qualified & Trainee Caseworker

- Experience of working within an advice and information organisation within the third/charity sector
- Understanding of, and commitment to, the aims and principles of the Citizens Service in which equality and diversity is embedded throughout



What we give our staff

We provide a range of colleague benefits from flexible working to wellbeing support and prioritising learning and development.

You can [read all our colleagues' benefits in this google document](#).

Equality and diversity

We are fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us. It's important to us that our team reflects the rich diversity of the communities that we serve.

We're keen to receive applications from the LGBTQIA+ community, people with disabilities, health conditions or impairments and people who are from Black Asian Minority Ethnic (BAME) communities.