

Financial Wellbeing Adviser

Job Pack

Thank you for your interest in working at Citizens Advice 1066 (CA1066). This job pack should give you everything you need to know to apply for this role and what it means to work in the Citizens Advice service.

In this pack you'll find:

- Our values
- 3 things you should know about us
- How the Citizens Advice network works
- Information about the organisation, team and the role
- The role profile and person specification
- The benefits of working for the organisation
- Our approach to equality and diversity.
- Guidance notes for applicants



Need more information?

If you have further questions about the role, you can call 01424 721420 or contact us at recruitment@citizensadvice1066.co.uk



To apply

Please complete the application form **in full** and return to recruitment@citizensadvice1066.co.uk

We will have multiple interview dates for this role.

Please note that we **do not** accept CVs.

Citizens Advice 1066

As a member of the Citizens Advice service, CA1066 provides free, confidential, independent and impartial advice and information to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

We are committed to putting equality and equity at the heart of everything that we do, with the overarching aim of being the go-to charity for anyone in our borough in need of help, to find a way forward. This means we look at improving access, treating people with empathy and promoting an inclusive working environment for all of our colleagues.



Our values

We're inventive - We're not afraid of trying new things and 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.

Three things you should know about us

We're local and we're national

CA1066 has offices in Hastings and Bexhill, deliver outreach sessions for clients across Rother District, and give energy advice across East Sussex, in partnership with other local Citizens Advice. The Citizens Advice service is made up of Citizens Advice – the national charity – and a network of over 250 local Citizens Advice members across England and Wales.

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.

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 works

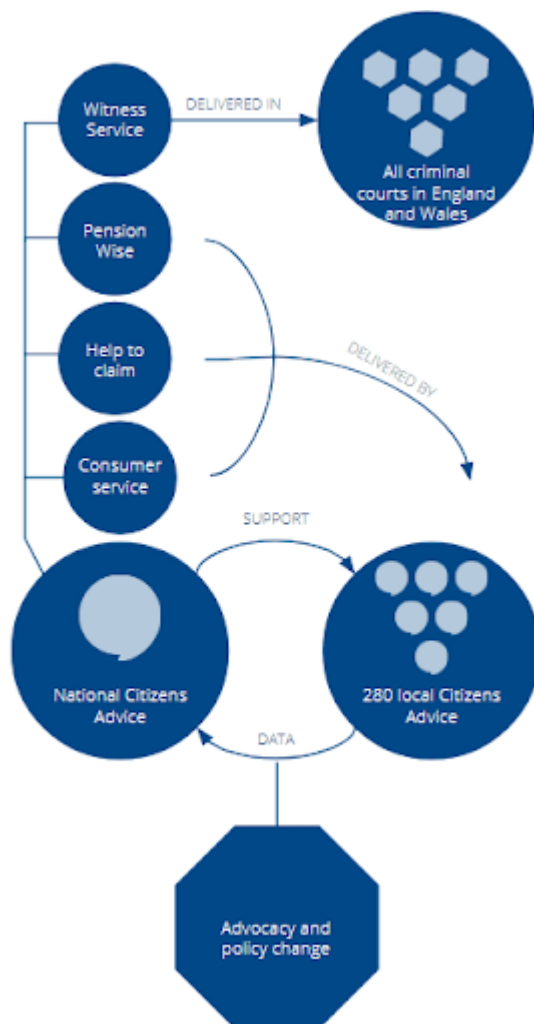
The Citizens Advice network delivers services from:

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

They do this with:

- 7,700 local staff
- Over 21,300 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.



The role and our team

The role you're applying for is: **Financial Capability Adviser**

The role will report to our Operations Manager and Partnerships and Development Manager.

You can find out more about us via:

- The [Citizens Advice 1066 website](#)
- The [national Citizens Advice website](#) and the Citizens Advice [Campaigning site](#).

The application process

1. Download the application pack (this document) and application form from the Citizens Advice 1066 website
2. Complete the application form **in full**, and submit it by email to recruitment@citizensadvice1066.co.uk in time for the closing date.
3. We will invite applicants who meet the required standard for an in-person interview at our office in St Leonards.
4. Applicants will be notified of the outcome of their application.

The Role

Role	Financial Wellbeing Adviser
Salary	£26,927 Full-time, pro rata for part-time
Hours	30 to 37 per week, flexible – subject to discussion
Location	CA1066 office in St Leonards-on-Sea when not carrying out home visits
Reporting to	Operations Manager and Partnerships and Development Manager
Contract type	Permanent

General introduction

The objects of Citizens Advice 1066 (CA1066) are to promote any charitable purpose for the public benefit by the advancement of education, the protection and preservation of health and the relief of poverty, sickness and distress in particular, but without limitation, for the benefit of the community in Hastings, Rother and surrounding areas.

To deliver these objects CA1066 provides a range of advice services across Hastings, Rother and East Sussex through a range of advice channels.

Role purpose: To deliver financial capability advice to individuals.

Job Responsibilities: Delivering financial capability sessions in an interesting and engaging manner; covering debt prevention, money management and digital skills including budgeting, using bank accounts, options for borrowing and saving, dealing with debt and saving energy.

Role Profile

Main responsibilities	Key tasks	Time %
Financial capability and energy advice to clients	<ul style="list-style-type: none"> • Deliver financial capability advice and support to clients on issues such as tackling fuel poverty, behaviour change to keep warm and well and cut costs on bills, eligibility for energy efficiency measures, making charitable applications, benefits maximisation, dealing with energy debts. This work may take place in locations across the county. • Support digital inclusion work through identifying clients who need support, working with partners to issue devices and providing training. Support clients in getting online access to services. • Keep up to date with personal finance topics, available training materials and other resources. 	70%
Working with partners	<ul style="list-style-type: none"> • Establish, develop and maintain a range of partnerships to reach learners and gain support for the project. • Attend relevant external meetings 	10%
Administration and other general duties	<ul style="list-style-type: none"> • Establish and maintain effective and efficient administration systems for the delivery of the project. • Use IT for statistical recording, record keeping and document production. • Participate fully in the life of the bureau, attend adviser meetings, internal planning events etc as agreed with line manager. • Support other bureau work as required. • Abide by CA1066 health and safety guidelines. • Carry out any other appropriate tasks requested by the manager, to ensure the effective delivery and development of the service. • Undertake tasks related to continuous professional development. • Promote the aims, policies, and membership requirements of the Citizens Advice service. 	20%

Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the role and is not included to be an inflexible list of tasks.

The Citizens Advice Service is a fast-moving organisation and therefore an employee's duties may be varied from time to time. The post holder accepts that they may be required to work flexibly and undertake any other work or duties as may reasonably be required, within the scope of and commensurate to the nature of the post.

Person Specification

The Financial Capability Adviser must commit to CA 1066 objectives, support its ethos and have the following skills:

1. Experience of providing energy advice, consumer advice or financial and digital engagement activities in a variety of settings.
2. Knowledge of the factors impacting households facing fuel poverty; behaviour change and advice for consumers on carbon reduction.
3. Knowledge and experience of using IT systems and packages to provide effective support in the delivery of services.
4. Demonstrable knowledge and understanding of the needs of people from diverse social/cultural and racial backgrounds and with a wide range of abilities.
5. Demonstrable organisational skills, flexibility, ability to negotiate and prioritise own work.
6. Experience of empowering and engaging with adults who have had poor experiences of formal education.
7. Good interpersonal skills, including the ability to relate and work with a large variety of different people.
8. Numerate and literate to the level required by the tasks.
9. Experience of working in a customer service-focused setting.
10. UK driving licence and access to a vehicle are preferred, but exceptions may be possible

Key Competencies

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|---------------------------------------|--|
| ❖ Meeting Customers' Needs | ❖ Working Well Together |
| ❖ Planning and Organising | ❖ Innovative and Adaptable to Change |
| ❖ Achieving Quality Solutions | ❖ Understanding the Business and its Environment |
| ❖ Problem-solving and Decision-making | |

A competent person demonstrates they:

- Make a positive contribution to team objectives
- Achieve agreed standards and objectives
- Demonstrate understanding of responsibilities of role
- Know who to ask for and how to access information
- Manage own workload effectively
- Demonstrate ability to use IT systems to produce high quality documents and interpret data

What we give our staff

We value the people who work here - and we show that in what we offer. As well as things like annual leave and our workplace pension, working at Citizens Advice means getting access to many benefits.

- A 37 hour (full time) working week, with a Time Off In Lieu (TOIL) system
- Full-time employees working 37 hours per week or more are entitled to 31 days' paid annual leave (including the eight statutory holidays). Increasing to 32 days after 3 years of continuous employment and capped at 33 days after 4 years. Employees contracted to work less than full-time hours will have a holiday entitlement which is calculated pro rata according to their contracted number of hours per week, as compared to a full-time employee.
- 3% employer contribution pension scheme
- Access to a mental health and wellbeing service that offers anonymous, confidential support 24 hours a day, 365 days a year
- Central locations in Bexhill and St Leonards, with good access to public transport.
- Opportunities to engage in both personal and professional development

Equality and diversity at Citizens Advice

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.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

We judge the application, not the person. The selection panel won't see your personal details. This makes sure each person's response is judged on its merits and not on their background.

Additional information

Please see the [CA1066 website](#) for information on the following:

- Disability
- Entitlement to work in the UK
- Diversity monitoring
- GDPR: How we will use your information
- References
- Criminal Convictions/DBS

Guidance Notes for Applicants

Our recruitment process is competency-based. The purpose is to assess how closely your skills and experience, including voluntary and wider life experience, relate directly to the skill areas set out in the Admin Officer person specification. The person specification is included in the job description. For each bullet point we are looking for evidence that you meet it through experience or that it would be a logical next step on what you have achieved previously. The best applications will give examples of what you have done rather than respond on an abstract or theoretical basis. The key competencies list shows the broad areas which apply to this role. There is no need to write examples against the points in this list. We will use your responses to the person specification to inform our assessment against the competencies.

We wish you every success in your application, and thank you for taking the time to consider joining us.