



Citizens Advice East Dorset and Purbeck

Financial Capability Adviser

Overview

Thanks for your interest in working at Citizens Advice East Dorset & Purbeck. This job pack should give you everything you need to know to apply for this role.

Citizens Advice East Dorset & Purbeck is an innovative and successful advice service which offers confidential advice online, over the phone and in person, for free. We put clients first and focus on delivering high quality information, advice and casework by telephone, face to face and digitally.

We have two vacancies in our successful homelessness prevention and support project **Moving On**. This project has been running for 5 years and is currently funded by two funders, Nationwide and Henry Smith. The current funding runs until 31st March 2022 and 31st December 2023 consecutively, with continuation funding anticipated.

We are looking for highly motivated people with excellent interpersonal and organisational skills and the ability to work independently and manage your own workload.

For the Housing role you should have experience of giving Housing Advice and working with clients and third parties to solve their housing issues at a casework level. This may include preparation for court. You will also be required to coordinate the team through regular case conferences.

For the Financial Capability role, you should have a sound knowledge and experience of welfare benefits advice and as well as financial capability experience. You will work closely with the Housing Caseworker and the Project Admin.

For both roles you will have the ability to understand written and oral information of some complexity; have good numeracy skills sufficient to compile accurate financial information where necessary, have effective oral and written communication skills for the purposes of negotiation and reporting.

Job Description

Role	FINANCIAL CAPABILITY ADVISER - MOVING ON PROJECT
Salary	£24,982 - £25,481 pa pro rata (dependent on experience)
Location	East Dorset & Purbeck
Hours	21 per week
Contract	Fixed Term: 21 hours currently and until 31st March 2022 then 14 hours until 31st December 2023. (2 x contracts; expected to be extended so hours may remain).

Role Context:

The post provides specialist caseworker support for multi disadvantaged people who are homeless or vulnerably housed.

The Moving On project is funded by two funders; Nationwide and Henry Smith. The project supports people who are homeless or at risk of homelessness. Specialist Caseworkers will work in a team to provide intensive support through a coordinated strategy over a 6 to 12-month period to support and up-skill individuals. For example, they may help to:

- take court action to keep someone in their home
- find suitable accommodation
- maximise income through welfare benefit applications/appeals or charitable grants
- implement appropriate debt management solutions.

Reducing debt (including rent arrears) and maximising income means that beneficiaries are more likely to get, and keep, tenancies- ultimately avoiding homelessness now and in the future.

The post holder will support clients from identified core groups who have been supported into new accommodation to ensure they maintain their tenancy. The intention of the project is to enable clients to recognise basic concepts of good money management, ensure income is maximised to the best advantage, where appropriate to be given options on how to manage their debts and prioritise the choices they make for their long-term future.

The post holder will account to the Project Manager and Project Supervisor for carrying out the activities listed below.

Note The applicant must be able to demonstrate casework competence in both financial capability and welfare benefits advice and have sufficient experience in generalist advice work to identify other related issues eg. Housing and debt.

**Key
accountabilities**

Key elements & tasks

<p>Plan and provide financial capability activities</p>	<ul style="list-style-type: none"> ● Work with clients and if appropriate, partner agencies to identify individual's financial capability needs and assist clients with the following range of options: <ol style="list-style-type: none"> 1. Basic household financial management and assistance to set up systems to pay essential household bills. 2. Identifying and applying for local assistance with furnishing the property eg, grants, charitable support. 3. Provide financial capability advice and education in money management skills. 4. Check entitlement to welfare benefits and assist where appropriate to make applications. 5. Identify and either assist or refer internally for assistance with applications for claiming the best utility deals e.g local water social tariff assistance schemes or energy best deals. 6. Identify any debt issues and provide options for support to manage them where appropriate. ● Simple budgeting information and training will also be offered to help clients identify what is affordable. ● Ensure systems are in place to collect feedback on what clients have learnt and been able to put into practice. ● Collate and review feedback on outcomes and the quality of the service.
<p>Project coordination</p>	<ul style="list-style-type: none"> ● Work in a team with other project caseworkers/advice support staff. ● Coordinate regular client case conference meetings within the team. ● Collect, collate and present project monitoring and evaluation data. ● Contribute to the development of literature to promote the project. ● Attend relevant external meetings.

<p>Professional development</p>	<ul style="list-style-type: none"> ● Identify and implement plans for own training and development needs. ● Keep up to date with personal finance topics, available training materials and other resources. ● Prepare for and attend supervision sessions / team meetings / staff meetings as appropriate.
<p>Research and Campaigns</p>	<p>Support our research and campaigns work through various channels including case studies, data collection and client consent.</p>
<p>Other duties and responsibilities</p>	<ul style="list-style-type: none"> ● Uphold the aims and principles of the Citizens Advice service and its equal opportunities policies. ● Establish and maintain effective and efficient administration systems for the delivery of the project. ● Use IT for statistical recording, record keeping and document production.

	<ul style="list-style-type: none"> • Abide by health and safety guidelines and share responsibility for own safety and that of colleagues. • Carry out any other appropriate tasks requested by the project manager, to ensure the effective delivery and development of the service.
	<p>Equality/Diversity</p> <ul style="list-style-type: none"> • The post holder must have due regard in the planning and execution of their duties at all times to the Citizens Advice Equality & Diversity Policy (“Stand Up for Equality”). • At all times, promote the aims, principles, policies, interests and wellbeing of the organisation and to protect its integrity and reputation, and to ensure that the Service complies with the Equality Act 2010.
	<p>Information Technology</p> <ul style="list-style-type: none"> • Adhere to good practice with regard to acceptable IT use.
<p>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 job and is not included to be an inflexible list of tasks.</p> <p>Citizens Advice East Dorset & Purbeck 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.</p>	

Person specification

Essential Criteria

1. Demonstrable understanding of Welfare Benefits
2. Ability to interpret regulations and explain them to clients and colleagues and to produce clear advice and empowerment.
3. Ability to interpret complex information to be able to make decisions.
4. Ability to work on own initiative, proactively manage a varied workload, ensuring deadlines are met
5. Excellent IT skills and experience of commonly used software packages.
6. Excellent customer service skills and ability to manage difficult conversations.
7. Good interpersonal and communication skills.
8. Flexible approach and willingness to work as part of a team.
9. Literate and numerate to the level required by the tasks
10. A thorough understanding of professional boundaries and the issues surrounding confidentiality and data protection
11. Understanding and commitment to the aims, principles and values of Citizens Advice East Dorset & Purbeck.

12. Experience of working within an advice and information organisation within the third/ charity sector (desirable)

Requirements for role

- Ability to contribute to an adaptable, respectful and responsible organisational culture in line with our values.
- Ability and willingness to work as part of a team and a commitment to collective team responsibility.
- Understanding of, and commitment to, the aims and principles of the Citizens Service in which equality and diversity is embedded throughout.
- Awareness that Citizens Advice clients are at the heart of everything we do.

For an application pack please contact sue.spear@edpcitizensadvice.org.uk

Closing date:	10am on Thursday 26 th August 2021
Interview Date:	Thursday 2 nd September 2021

What we give our staff

We value all our people and can offer a supportive culture within a charity setting that is committed to social justice. The role attracts an attractive remuneration package with excellent terms including:

- A 37 hour working week
- Pension scheme
- Contractual sick pay
- Generous holiday entitlement starting at 28 days per year (in addition to bank holidays) and rising with long service awards.

Disclosure and Barring Service Checks (DBS)

Some Citizens Advice East Dorset & Purbeck positions may require the successful candidate to undergo a DBS check.

Equality & Diversity

Citizens Advice East Dorset & Purbeck recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable. Citizens Advice East Dorset & Purbeck will not discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, transgender, disability, nationality, national or ethnic origin, religion or belief, marital/partnership or family status, sexual orientation, age, social class, educational background, employment status, working pattern, trade union membership or any other irrelevant factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other.

All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles. Breaches of the policy may lead to disciplinary action.

Dignity at Work

Citizens Advice East Dorset & Purbeck is committed to providing a culture in which all staff value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

Probationary Policy

New appointments are subject to a three-month probationary period. At the end of the probationary period the outcome of the assessment may be confirmation of post; notice of dismissal; or at Citizens Advice's discretion, an extension of the probationary period by a further three months.

Flexibility

Our roles are open to discussion about flexible working, which may include arrangements such as part-time working, formalised flexitime, fixed (non-standard) working hours, working from home and job-sharing.

Our People

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 commitment to your development.** We have a coordinated staff training and development strategy. This means that training will be provided both for your current job and for your development.
- **Employee assistance programme.** Everyone working at Citizens Advice East Dorset & Purbeck has immediate access to professional and completely confidential counselling and advisory services.
- **Support when things in your life change.** We'll be there for you with options for flexible working, career breaks, and support for parents and carers.

Equality and fairness within recruitment

Citizens Advice East Dorset & Purbeck is 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 select panel won't see your personal details. This makes sure each person's response is judged on its merits and not on their background.
- **We offer a guaranteed interview scheme.** If you have a disability and your application meets the minimum criteria for the post, we'll interview you for it.
- **We're a Disability Confident employer.** We're committed to changing attitudes towards disability, and making sure disabled people have the chance to fulfil their aspirations.

