

Title: Financial Resilience Guider

Job pack

Thanks for your interest in working at Citizens Advice Bournemouth Christchurch and Poole. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our Aims and Values.
- 3 things you should know about us.
- Overview of Citizens Advice and Citizens Advice Bournemouth Christchurch & Poole.
- 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 dan.stannard@citizensadvicebcp.org.uk

Our Aims

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect peoples lives

We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities.

We value diversity, promote equality and challenge discrimination

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.

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 Bournemouth Christchurch & Poole works

Every year thousands of people come to us for advice and help with solving their problems.

We're here for everyone and help with problems like managing debt or household bills, understanding rights at work or housing issues. We also provide specialist services in welfare, benefits and debt.

Our projects include Macmillan Cancer support, Pension Wise, EU Settlement Scheme, Hate Crime, multiple specialist Benefits and Debt services.

We're an important part of this community, with 4 offices across Bournemouth Christchurch and Poole, where people need us.

Through our daily interaction with clients, we have a credible understanding of local needs. We use our data and insight to tailor our services, as well as help improve policies and practices locally.

Putting our clients' needs at the heart of decision-making means we also work in partnership, making it easier for clients to access relevant services.

We're also part of the Citizens Advice service. This means we share knowledge and best practice so that people can expect a quality service.

Together we work to fix the underlying causes of people's problems using evidence gathered from across our network. Because of this we save society money.

Last year we helped people with over 29,000 issues through face to face, telephone and webchat.

Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 280 local Citizens Advice members.

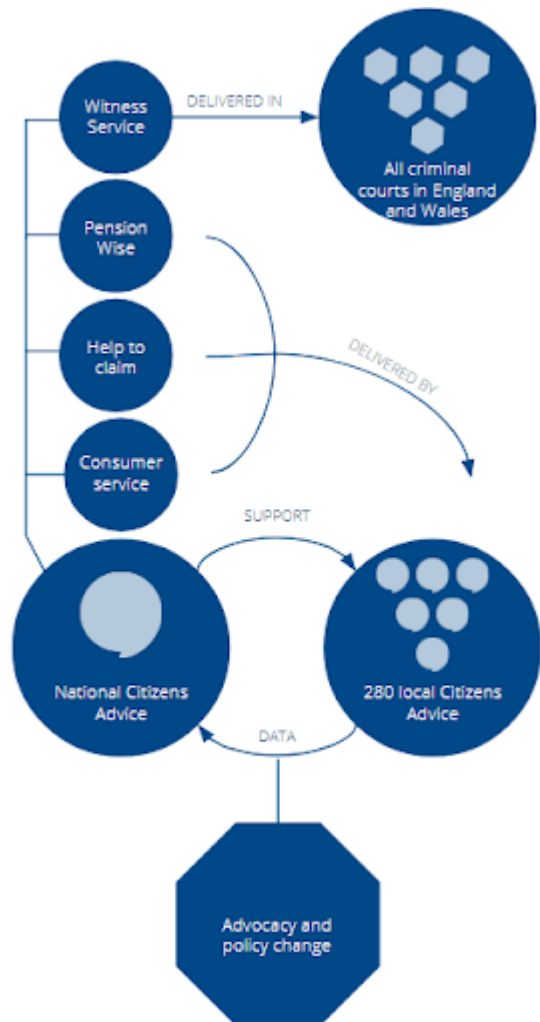
This role sits our network of independent charities, delivering services from

- 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.





The role

The successful candidate will be the first and main point of contact for the Citizens Advice BCP Financial Resilience helpline. This triage service has been set up by local partners, including BCP council, and will be managed by Citizens Advice BCP in order to provide financial support to BCP residents during times of particular financial difficulty. The Financial Resilience Guider will be responsible for overseeing day-to-day project administration activities for the Financial Resilience project. They will be responsible for answering calls and referring clients for further support tailored to their needs, especially specialist financial support services and activities.

The Financial Resilience Guider will work closely with all project staff including Advice Session Supervisors, Money Talks Team, volunteers, third party partners and the Head of Operations and Service Delivery on a day to day basis.



Role profile

Responsibilities:

- First and main point of contact for vulnerable clients contacting the Financial Resilience service for further guidance with a wide variety of financial difficulties.
- Set up easy referral procedures with all internal and external project partners.
- Identify clients who meet the criteria for various project partners assistance (including debt support, housing support, budgeting support) and follow appropriate procedures for signposting those clients into the correct service to meet their needs.
- Follow up with clients, ensuring that they are receiving the right support in a timely fashion to meet their needs. Identify need for, and make, further referrals to internal or external sources of information/advice.
- Support management with the collation of helpline statistics.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Any other relevant administrative and support duties required to ensure the smooth running of the service.

- Ensure that work undertaken reflects and supports the Citizens Advice service's equality and diversity strategy.
- Use relevant IT and case management systems to record cases, activities and statistics in line with CABCP requirements.
- Work with colleagues to maintain accurate and complete records as required by the funder in order to safeguard future project funding.
- Manage a case load of continuing financial wellbeing support and advice.
- Apply Citizens Advice aims, principles and policies when dealing with money advice enquiries.
- Recognise own levels of competence and know when to seek help from more experienced advisers.
- Ensure that all work meets the quality standards required by CABCP.
- Attend staff and team meetings regularly.
- Undertake any other duties that may be within the scope of the post as specified by the Team Leader.

Professional development:

- Keep up to date with legislation, case law, policies and procedures relating to debt, money advice & financial capability and undertake appropriate training.
- Read relevant publications.
- 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.
- Assist with Service initiatives for the improvement of services.



Person specification

1. An understanding of and commitment to the aims and principles of the Citizens Advice service including the service's equality and diversity policies.
2. An understanding of discrimination or the willingness to learn about it.
3. Ability to give and receive feedback objectively and sensitively and willingness to challenge constructively.
4. Ability to monitor and maintain own standards.
5. Experience of providing reception services or similar, preferably within a social welfare environment.
6. Excellent verbal communication skills including telephone skills.
7. Good numeracy and literacy skills.

8. Ability to access relevant signposting information including electronic and written materials.
9. Ability to implement administrative policies and procedures in a busy work environment.
10. Good IT skills, including MS Word, email and the internet.
11. Flexibility and willingness to work as part of a team.
12. Friendliness and approachability.
13. Awareness of the potential needs of, and demands placed on, vulnerable clients.
14. Understanding of Citizens Advice processes and procedures.
15. Ability to manage time effectively.



Terms and conditions

A copy of our Terms and Conditions will be provided on successful appointment



What we give our staff

We offer ongoing training and support, generous annual leave, access to online health/wellbeing resources, an Employee Assistance Programme and employers pension contribution.