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**Financial Capability Adviser  
Job pack**

Thanks for your interest in working at Citizens Advice St Helens. 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:

* How Citizens Advice St Helens works
* The role profile and personal specification
* Terms and conditions
* What we give our staff

**How Citizens Advice St Helens works**

Citizens Advice St Helens operates a multi-channel service offering advice over the phone, by email and face to face. We currently operate from a permanent location at the Millennium Centre in St Helens, as well as outreach in various locations.

We have changed our operation significantly in the last several years and staff work both in the office and remotely from home.

We currently have a team of 21 paid staff and 9 volunteers delivering a full generalist service with casework in debt and benefits, Foodbank project, Mind & Money and Energy Projects.

**The Role**

Citizens Advice St Helens working in partnership with United Utilities Trust Fund, whom fund, provides a service to those residents of St Helens, in particular single parents with young children.

We are looking for an experienced, well-organised Adviser (trainee considered) to

co-ordinate access to advice for allocated clients who are at higher risk of disengaging from advice services, remaining in contact with them throughout their advice journey to remove barriers and support them achieve better outcomes. You will work closely with other colleagues and other Citizens Advice St Helens teams to support ongoing client engagement.

You will improve financial wellbeing by checking that clients are in receipt of the correct welfare benefits, identifying and making grant & trust fund applications, and advising on other income maximisation options. You will help clients prepare a basic household budget and support them in gathering up-to-date financial information in preparation for debt appointments.

**Role Profile**

**Key Worker**

* Main point of contact for clients attending the Baby Basics outreach
* Assess clients’ advice and support needs
* Help clients identify goals and devise / review advice action plans
* Support clients gathering and submitting information needed to progress their enquiries.
* Co-ordinate clients access to advice, ensuring they are prepared for both internal and external appointments.
* Liaise with external referral partners where appropriate

**Income Maximisation Advice**

* Carry out benefit checks and calculations to identify entitlement
* Explore the best Energy and Utilities deals with the completion of a energy price comparison tool.
* Assist to make applications for relevant welfare benefits
* To help and assist to challenge adverse benefit decisions
* Identify and make applications to any other suitable grants and forms of assistance, in addition to UU schemes
* Explore other income maximisation options with the client
* Issue Fuel Vouchers
* Support clients to access Discretionary Housing Payments and the Local Authority Welfare Assistance Scheme.
* Support clients to prepare an initial budget and gather details of any debts.

**Referrals**

* Identify urgent specialist debt advice needs and support the client to access advice
* Attach all client paperwork to our case recording system to support internal referrals
* Support client to make appointments for external referrals and help prepare for appointment i.e. specialist housing appointments.
* Follow up all referrals with the client to check advice needs continuing to be met

**Case Management**

* Maintain case records for the purpose of continuity of advice, information retrieval, statistical monitoring and report preparation
* Ensure that all work conforms to the organisations systems and procedures and funder requirements
* Record outcomes for case management and reporting purposes

**Other**

* Keep up to date with Citizens Advice Aims, policies and procedures and ensure these are followed.
* Ensure that work reflects and supports the Citizens Advice service's equality, diversity and inclusion strategy.
* Support our research and campaigns work through various channels including case studies, data collection and client consent
* Abide by health and safety guidelines and share responsibility for your own health and safety and that of colleagues.
* Work cooperatively with colleagues and encourage good teamwork, clear lines of communication and common practices within the team.
* Carry out any other tasks within the scope of the post to ensure the effective delivery and development of the service.
* Attend relevant internal and external meetings as agreed with the line manager
* Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate
* Identify own learning and development needs and take steps to address these with your Line Manager

**Person Specification**

1. Understanding of barriers to advice with an emphasis on welfare benefits, debt advice and Energy Advice.
2. Excellent communication skills with an ability to quickly engage with vulnerable clients.
3. Experience of identifying and calculating benefit entitlement in a professional voluntary or paid position.
4. Understanding of the Debt Advice Process, debt emergencies and have the ability to carry out debt assessments.
5. Experience of supporting clients with grant and trust fund applications
6. Ability to plan and prioritise own work to manage a caseload and meet deadlines.
7. Ability and willingness to work both on own initiative and as part of a team to meet high targets and excel against objectives.
8. Ability to use IT systems and packages, and electronic resources in the provision of advice and casework.
9. The ability to commit to and work within the aims, principles and policies of the Citizens Advice service and the vision of Citizens Advice St Helens
10. A commitment to continuous professional development, including a willingness to develop knowledge and skills in advice topics.
11. Flexibility for home working and working from a number of office and outreach locations across St Helens as required for the post.

**Terms and Conditions**

**Job Title:**  Financial Capability Adviser

**Responsible to:** Money Advice Supervisor

**Salary:**  £ + up to 5% pension

**Hours of work:**  36 (may be occasionally required to attend events outside of normal office hours but time off in lieu arrangements in place)

**Location:**  Hybrid working from home, office and various outreaches in St Helens.

**What we give our staff**

* 25 days paid holiday per year plus Bank Holidays
* Hybrid working from home offered after successful probationary period of 6 months
* Up to 5% employers contribution to workplace pension scheme with 4% employees contribution
* A commitment to Continued Professional Development and payment of membership fees to professional bodies where this will enhance your work
* Access to Citizens Advice national training programme
* Opportunity to work as part of a national network of Citizens Advice offices
* Employee Assistance Programme including 24hr helpline support and legal advice
* Mental Health and Wellbeing Support from Togetherall
* Perks and savings via our partnership with Lifeworks these include savings on cinema tickets, giftcards and cashback on some purchases

**Want to chat about this role?**

If you want to chat about the role further, you can contact Susan Pritchard by emailing [susan.pritchard@casthelens.org.uk](mailto:susan.pritchard@casthelens.org.uk)

Closing date for applications: 12pm on Friday 10th January 2025

Interview date: Tuesday 23rd January 2025