



# Money Advice Assistant Job pack

Thanks for your interest in working at Citizens Advice Cheshire West. 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 organisation
- Our values
- 3 things you should know about the Citizens Advice service
- Information about the role
- The role profile and person specification



# Citizens Advice Cheshire West

## WHO ARE WE?

We are a locally focussed charity and the largest independent advice agency in Cheshire West and Chester. We operate four full-time offices, in Chester, Ellesmere Port, Northwich and Winsford, offering information, advice and assistance on most aspects of social welfare law. In 2017/18, we helped around 16,000 people from across the areas we serve.

## WHAT WE DO

We provide free, impartial advice and information on a range of issues including employment, benefits, housing and debt. We offer a comprehensive service of information, advice, advocacy and representation, as well as working actively for change in the policies and practices of organisations that impact on the lives of the people we work with.

## WHO WE WORK WITH

Through our daily interaction with residents from Cheshire West, we have an in-depth understanding of the issues local people are struggling with and we use our data and insight to tailor our services so that they help address the needs of local people.

## RECOGNISING NEEDS

We recognise that problems don't just happen in isolation, but can have a severe effect on people's lives. Solving them helps to stop these situations escalating. The wider impact of advice (what we achieve as a result of solving problems and providing support) is just as important. Four out of every five people we work with said that our advice helped improve their lives.

## THE DIFFERENCE WE MAKE

Having a problem can adversely affect a person's mental or physical health. 70% of the people we help say they feel less stressed and 46% say their physical health improved. This is also true for people with existing health conditions who require additional support from health services. 57% said they were better able to manage their condition after coming to us.

## Our values

**We're respectful.** We treat others as we would wish to be treated ourselves.

**We're helpful.** We work cooperatively.

**We're effective.** We seek to secure the best-possible outcomes.

## 3 things you should know about Citizens Advice

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in over 290 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 works

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 in the national charity which includes

- 800 national staff working in one of our 6 offices or as homeworkers, or as part of the Witness Service from over 240 courts across England and Wales
- 3000 Witness Service volunteers

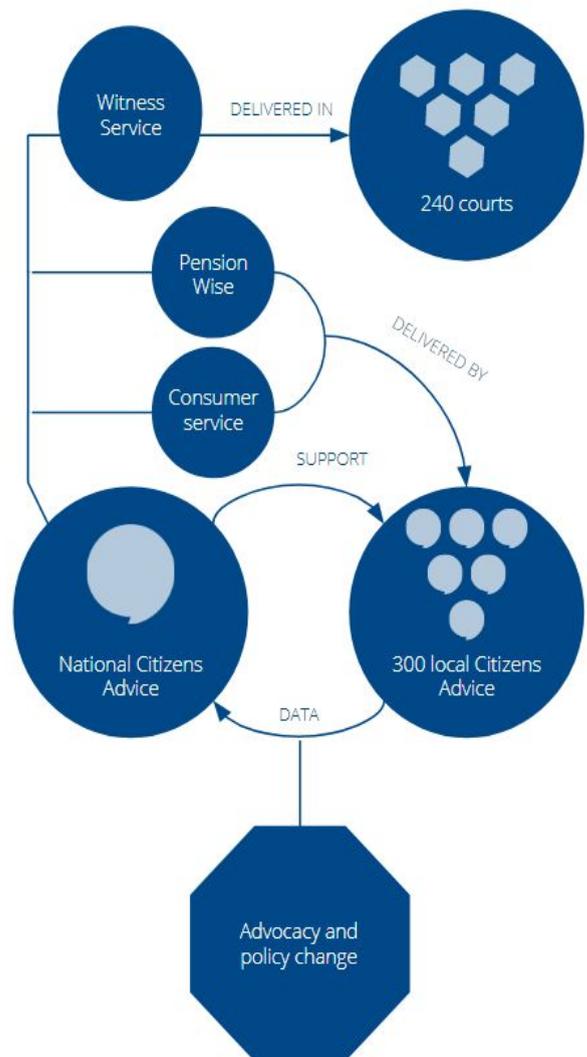
Our network members are all independent charities, delivering services from

- 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



## Role profile

<b>Job Title:</b>	Money Advice Assistant
<b>Reporting to:</b>	Money Advice Manager
<b>Salary:</b>	£21,589 (pro rata)
<b>Hours of work:</b>	15 hours pw
<b>Location:</b>	Winsford (covering Winsford & Northwich area)
<b>Role purpose:</b>	To work as part of the money advice team helping to prepare clients for their money advice appointments and supporting them following their money advice appointments. This will include identifying and assisting the client in accessing help with emergencies and wider advice and support needs.
<b>Key accountabilities</b>	<b>Key elements/Tasks</b>
<b>Money advice support</b>	<ul style="list-style-type: none"><li>- Making contact with clients referred for money advice to offer support and reassurance, check for emergencies, remind them what information to bring and check whether they need any assistance in gathering this.</li><li>- Helping clients prepare to see their money adviser by assisting them in organising the information needed for the appointment, checking consents and using established software to input data and prepare financial statements.</li><li>- Ensuring a smooth handover to the money adviser.</li></ul>

	<ul style="list-style-type: none"> <li>- Identify and assist with holistic advice needs.</li> <li>- Offering follow up support and encouragement to clients.</li> <li>- Make home/outreach visits when appropriate.</li> </ul>
<b>Quality, systems and procedures</b>	<ul style="list-style-type: none"> <li>- Process money advice referrals to/from statutory agencies and other voluntary sector organisations.</li> <li>- Ensure that client work conforms to relevant quality standards.</li> <li>- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.</li> <li>- Ensure that all work conforms to the LCA's systems and procedures</li> <li>- Meet set performance objectives/targets as agreed with your line manager and in line with funder and/or organisational requirements.</li> </ul>
<b>General</b>	<ul style="list-style-type: none"> <li>- Identify own learning and development needs and take steps to ensure that these are addressed.</li> <li>- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.</li> <li>- Keep up to date with Citizens Advice aims, policies and procedures and ensure these are followed.</li> <li>- Develop and maintain effective admin systems and records relevant to the role.</li> <li>- Attend regular internal and external meetings relevant to the role (staff, team, consortium etc).</li> <li>- Work cooperatively with colleagues and encourage good teamwork, clear lines of communication and common practices within the team.</li> <li>- Abide by health and safety guidelines and share responsibility for own health and safety and that of colleagues.</li> </ul>



# Person specification

## Experience and skills

1. A minimum of 1 years experience of working in a customer/client facing environment (desirable)
2. Good IT skills including the ability to use IT for record keeping, information retrieval and statistical reporting.
3. Demonstration of ability and willingness to learn
4. High level of attention to detail and accuracy
5. High levels of numeracy and literacy
6. Experience of working to agreed quality standards
7. Working experience of electronic case management systems
8. Good interview and diagnostic skills including an empathetic approach to clients and the ability to structure an interview effectively
9. Ability to communicate effectively with people – both in writing and verbally
10. Ability to work on own initiative with minimum supervision
11. Ability to organise workload and manage time effectively
12. Demonstrable ability to work as part of a team
13. Self-motivated and flexible
14. Demonstrable understanding of the issues affecting society and their implications for clients and service provision.
15. Understanding of equality and diversity and its application to the provision of advice.

## **Extra requirements for role**

1. Awareness that Citizens Advice clients are at the heart of everything that we do.
2. A proven commitment to continuing professional development of self and wider team.
3. IT proficiency including competent use of Google and Microsoft Office.
4. Willingness to commit to and work within the values, aims, principles and policies of the Citizens Advice service in which equality and diversity is embedded throughout.
5. Current driving license and access to own transport.
6. Willingness to work outside normal office hours as required.

**Citizens Advice Cheshire West is committed to equality and diversity and welcomes applications from all sections of the community.**

**Citizens Advice Cheshire West treats your personal data collected during the recruitment process in accordance with its data protection policy. Information about how your data is used and the basis for processing your data is provided in our job applicant privacy notice at [www.citizensadvicecw.org.uk/vacancies](http://www.citizensadvicecw.org.uk/vacancies)**

