



Money Advice Outreach Adviser

Thanks for your interest in working at Citizens Advice South West Surrey. 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 values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice South West Surrey
- The role profile and personal specification
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Anna Rogerson by emailing anna.rogerson@casws.org.uk or calling 01483 230855

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.

Citizens Advice South West Surrey

Citizens Advice South West Surrey covers the areas of Waverley and Guildford Boroughs. Both borough areas are often considered to be affluent with high levels of employment and rates of home ownership. However there are significant pockets of deprivation. We're an independent local charity and limited company supporting some of the most vulnerable in our community.

We have 6 offices, in Ash, Cranleigh, Farnham, Godalming, Guildford and Haslemere, as well as delivering services at outreach in communities. We provide free, confidential, impartial and independent information, advice, casework and support for the benefit of the local community, as well as using our unique evidence based approach to exercise a responsible influence on policy and practice to address the underlying cause of problems for our clients.

Governed by a board of 6 trustees, we have a highly skilled workforce to support the organisation. This includes 39 staff and 168 volunteers.

We provide a generalist advice service through which the public can access advice from Monday to Friday through email, in person and over the telephone. Our core funding is primarily provided by Guildford Borough Council, Waverley Borough Councils and the Town and Parish Councils across Waverley, with additional support from donations.

In addition to our generalist advice service, we run 6 targeted and specialist services.

- **Cancer service** is funded by Macmillan Support and provides welfare benefit advice to people in Guildford, Waverley and Surrey Heath who are affected by cancer and is a largely telephone-based service. We also have an outreach service funded by and operating from the Fountain Centre for those being treated at Royal Surrey Hospital.
- **Mental Health service** provides a casework service (predominantly welfare benefits, debt and housing) to people with mental health issues. The service is currently available for people under secondary mental health care and is funded by the Surrey Heartlands Integrated Care Board, and Guildford and Waverley Alliance.
- **No-one Left Behind** is focused on community money advice, advice in communities and reducing poverty, funded by Surrey County Council, as part of their priority that no-one is left behind. It is run in collaboration with local Citizens Advice across Surrey.
- **Specialist Debt advice** - this includes advice to some of the most financially excluded groups in society funded by the Money and Pensions Service (MaPS).

- **Homelessness Prevention** is funded by Guildford Borough Council and is designed to support people who are at risk of homelessness by supporting them with debt, benefits and housing issues.
- **Community Engagement** is funded by Waverley Borough Council and Community Foundation for Surrey to provide those residents with the highest level of deprivation in Waverley the opportunity to improve their own life chances by bringing together partners to develop tools, community action and advice.

Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 250 local Citizens Advice members.

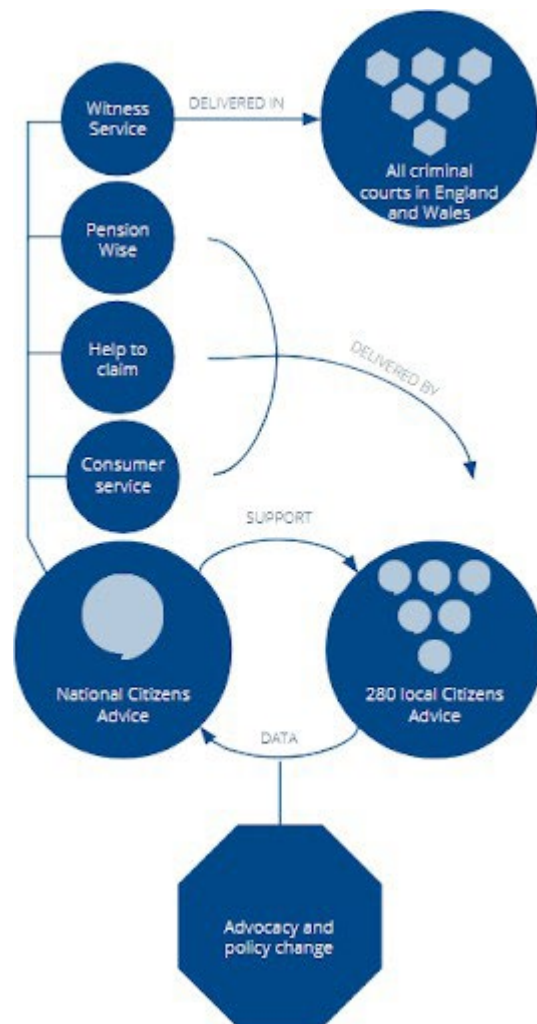
This role sits in our network of independent charities, delivering services from

- 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

22.5 hours a week

£23,400 - £26,000 FTE

Fixed term 12 month contract.

Based in Guildford/Waverley including agreed outreach locations across the boroughs

We are looking for a motivated team player with a 'can do' attitude to help us deliver a vital outreach project across Guildford and Waverley. You will deliver information and tailored advice to clients, with a particular focus on benefits, budgeting and debt.

You will be responsible for delivering advice in community locations, promoting the service to local stakeholders, and building strong partnerships.

You will provide support primarily from outreach venues across the Borough, alongside support through phone and email.

You will have a good knowledge and an understanding of advice giving and the ability to support clients in a sensitive but empowering way. You will also have strong IT skills and be able to communicate clearly and effectively face-to-face, in writing and over the phone.

This is a fantastic opportunity for someone who is passionate about supporting vulnerable adults to mitigate and manage the impacts of poverty as far as possible and enhance people's wider health, wellbeing and life chances.

Whilst experience of working within Citizens Advice would be desirable, we will happily support the right person through Citizens Advice accredited training to enable them to carry out the role.

Deadline – we'll consider applications as they arrive.

The Citizens Advice service values diversity, promotes equality and challenges discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled and Black, Asian and Minority Ethnic people, as they are currently underrepresented in our workforce



Role profile

Promoting and developing the Service

1. Working with colleagues and managers to ensure the project's objectives are clearly defined and delivered.
2. Promoting the service to the target client base and local community groups.
3. Work with the support of Managers to evaluate and develop the Project

Advice giving

4. Interview clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities.
5. Assess client's capability to help determine most appropriate next step to assist the client.
6. Identify key information about the problem including time limits, key dates and requirements for urgent advice or action
7. Use available information sources to find, interpret and communicate the relevant information to clients.
8. Research and explore options and implications so that clients can make informed decisions, using sensitive questioning.
9. Use available information sources and advice resources to find, interpret and communicate the relevant information to clients.
10. Providing support to clients with a clear plan of action to enable them to act for themselves.
11. Undertake advice as appropriate which may include:
 - maximising income for clients through benefit checks and budgeting;
 - carry out energy advice assessments
 - preparing detailed financial statements based on the clients' circumstances;
 - advising the client to budget and negotiate realistic repayment plans with creditors where appropriate
 - clarify with the client their priority and non-priority debts, to identify situations which require immediate action
 - advising clients on challenging decisions including the strength of their case;
 - assisting clients with other related problems, referring to other advisers or specialist agencies as appropriate.

12. Carry out financial capability interventions as appropriate which may include:
 - Working with clients (individually or in small groups) to develop their knowledge, skills and confidence in managing their money effectively and making informed financial choices.
 - Discuss money topics with clients such as money management, using bank accounts, options for borrowing and saving and dealing with debt.
 - Help clients find and understand information and tools online that can help them manage their money.
 - Help clients to look at different options for things like food, large items or services like phone, electricity or insurance.
 - Help clients to identify their goals and priorities and make an action plan to achieve them.
13. Refer internally or to other specialist agencies as appropriate.
14. Maintain detailed case records for the purpose of continuity of advice, information retrieval, statistical monitoring and report preparation.
15. Ensure all work conforms to relevant internal and external quality standards, systems, processes and procedures including Citizens Advice, the Advice Quality Standard and the Financial Conduct Authority.
16. Prioritise workload appropriately e.g. ensure deadlines are met, identify and action emergencies.
17. Maintain good working relationships with partner agencies
18. Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.

Research and campaigns

19. Support our research and campaigns work including submitting evidence forms and identifying case studies.

Professional development

20. Keep up to date with legislation, policies and procedures and undertake appropriate training including annual GDPR training.
21. Attend relevant internal and external meetings as agreed with your line manager
22. Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate.
23. Complete the required training to comply with quality assurance processes.

24. Share information and best practice with colleagues to improve the quality of advice
25. Participate in organisational initiatives to develop and improve services.

Other duties and responsibilities

1. Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
2. Demonstrate commitment to the aims and policies of Citizens Advice.
3. Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.



Person specification

Essential

1. Organised and proactive, self-motivated, and able to identify barriers to success and know when to seek help in resolving them.
2. A 'can do' attitude and collaborative approach to working with staff and volunteers.
3. Experience of carrying out benefit checks and supporting people to make benefit claims
4. Experience of delivering financial capability support
5. Excellent communication skills - face to face, in writing and over the phone, with the ability to use sensitive listening and questioning skills to get to the root of the issues and empower clients, whilst maintaining structure and control of meetings with them.
6. Ability to research, analyse and interpret complex information, and explain it to others.
7. Strong IT skills and ability to use Microsoft Office and support clients with their online benefit claims.
8. Ability to work on your own initiative and monitor and maintain your own standards of work.
9. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
10. A commitment to continuous professional development, including a willingness to develop knowledge and skills to carry out the role.
11. A good up to date understanding of equity, diversity, and inclusion.
12. A commitment to work within the aims, principles and policies of the Citizens Advice service.



What we give our staff

1. SALARY: As advertised

2. ANNUAL/TOTAL LEAVE

Employees are entitled to 6.2 weeks paid annual leave in each annual leave year (which includes all statutory holidays). In the case of full-time employees working a five-day week, this equates to 31 days paid annual leave (including the eight statutory holidays).

Employees working less than full-time hours will have a holiday entitlement which is calculated pro rata according to the number of days/hours per week, as compared to a full-time employee.

3. PENSION SCHEME

Citizens Advice South West Surrey provides an employee pension scheme. Further details of this scheme will be provided to the successful applicant at offer and contract stage.

4. DISCLOSURE AND BARRING SERVICE CHECKS (DBS)

Some Citizens Advice positions may require the successful candidate to undergo a DBS check.

5. EQUALITY AND DIVERSITY

Citizens Advice South West Surrey recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We recognise people with diverse 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 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 factor that is not relevant to your potential 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.

6. DIGNITY AT WORK

Citizens Advice South West Surrey is committed to providing a culture in which all staff value each other and can 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.

7. PROBATIONARY POLICY

New appointments are subject to a six-month probationary period. Performance is reviewed after three months and again after six months. At the end of the probationary period the outcome of the assessment may be confirmation of post; notice of dismissal; or at Citizens Advice South West Surrey's discretion, an extension of the probationary period by a further three months.

8. POLITICAL IMPARTIALITY

An important part of the principle of impartiality is that Citizens Advice staff are seen to be upholding the principle of party political impartiality. To avoid misunderstanding or conflicts of interest, guidelines have been established on staff taking part in party political activities. If you currently hold or are intending to stand for local or national political office, then we will expect you to tell us about this if shortlisted for interview.

9. LOCATION

As advertised

10.EMPLOYMENT STATUS

Permanent

11.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.

12. HOURS OF WORK

As advertised.