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£WiseUp Financial Capabilities

Administrator

A pilot project part funded by ESF

Job pack

Thanks for your interest in working at Citizens Advice Cornwall. 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 locally and as part of a nationwide service.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice Cornwall and Citizens Advice nationally
- The role profile and personal specification
- Terms and conditions
- What we give our staff



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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 9 local offices and several digital outreaches and work closely with 300 independent local Citizens Advice services across England and Wales and 6 national offices.

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.



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Citizens Advice Cornwall

Citizens Advice Cornwall offers free, independent, confidential and impartial advice to everyone, covering areas such as benefits, debt, employment, housing, consumer issues and discrimination. We value diversity, promote equality and challenge discrimination.

We aim at all times to recruit the person who is most suited to the job and welcome applications from people of all backgrounds. We particularly welcome applications from disabled, Black, Asian or Minority Ethnic people, as they are currently under-represented in our workforce.

Whilst we rely on volunteers to take on a wide variety of roles, the day-to-day management and organisation is undertaken by a dedicated team.

The service aims to:

- Provide the advice people need for the problems they face
- Improve the policies and practices that affect people's lives

We have 9 offices located across Cornwall and also deliver our services through phone, webchat, email, text service and face to face via digital Help Hubs and in person.

We help around 9,500 people every year across a range of projects including our Core Generalist Advice Service, Money Advice Service, Help to Claim (Universal Credit), Macmillan, specialist casework in housing, employment and benefits and financial capability and energy projects.

We have around 80 members of staff and up to 120 volunteers providing the service and we work with a number of other voluntary sector and statutory bodies to provide seamless support to the most vulnerable in our community.



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How we fit into the Citizens Advice service nationally

Citizens Advice Cornwall is an independent charity and a member of the national Citizens Advice service. Citizens Advice is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

The Citizens Advice service is a network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

This is provided by:

- 6,500 local staff
- over 23,000 trained volunteers

This means that 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live. Our ambition in Cornwall is that everyone can access our help easily and locally via phone, webchat, email, text and where necessary in person.





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The role

The Financial Capabilities Project is a 15 month pilot programme part funded by European Social Fund through Community Led Local Development. Providing money management and financial awareness training to people in West Cornwall who are unemployment and economically inactive needing support to move forward with their lives and into work.

The post holder will be required to provide administration support including maintaining diaries, booking appointments, venues and refreshments and ensuring all the paperwork and reporting is prepared correctly.

- 18.5 hours per week
- Salary - £18,250 - £19,631 FTE pro rata
- Fixed term contract from October 2021 December 2022
- Post based at one of the Citizens Advice offices in the West or can be done remotely.
- Full training provided.
- Access to mental health and wellbeing support from Togetherall
- 28 days holiday pro rata including Bank Holiday



Role profile

Administration

- Ensure the effective and efficient operation of the project administrative systems
- Support the Project Workers in arranging client meetings and group sessions
- Arrange venues for meetings and catering required
- Organise client transport if required
- Prepare letters, documents and reports as required.



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- Maintain and collate statistics, and produce to a prescribed format.
- Produce information from reports and databases to assist with effective case-management.
- Use photocopier, scanner, fax and other office machines as appropriate.
- Prepare client files for use by Project Workers.
- Create and maintain a structured filing system for storage and retrieval of documents, IT-based and hard-copy as required, in accordance with the bureau's systems and procedures.
- Support Project Workers with accurate entry of information on Casebook.
- Open, record and distribute incoming post, and prepare outgoing mail for dispatch.
- Maintain leaflets, posters and forms, on-line and hard-copy.
- Maintain and order stationery supplies.
- Liaise with Project Worker to ensure supply and maintenance of required reference material.
- Organise and maintain Project Workers' diaries and work records.
- Answer the telephone and refer calls or take messages. Send and respond to email.
- Maintain complaints procedures in accordance with Citizens Advice Guidelines and our complaints procedure
- Ensure all GDPR and data protection requirements are adhered to in all work for which the post is responsible

Finance

- Make payments from petty cash within pre-determined limits.
- Maintain and reconcile petty cash record, and prepare statements.
- Responsible for processing all disbursements, to a prescribed format.

Personal Development

- Keep up to date with legislation, policies and procedures and undertake appropriate training
- Attend relevant internal and external meetings as agreed with the line manager.
- Ensure full compliance with Confidentiality and Lone Working policies, GDPR, Safeguarding and ASK RE (Domestic violence)



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General

- Keep up to date with Citizens Advice aims, policies and procedures and ensure these are followed
- Keep up to date with charity policies, procedures and have an understanding and awareness of current client issues
- Ensure the work reflects and supports Citizens Advice service equality and diversity strategy
- Abide by health and safety guidelines and share responsibility for our own health and safety and that of the wider team
- Develop and maintain effective administration systems and records relevant to the role
- Represent the organisation as appropriate at Citizens Advice and other statutory, voluntary and commercial organisations, professional bodies and institutions.
- Maintain an awareness of the work of the Research and Campaigns team locally and nationally
- Identify social policy issues that support the work of the Research and Campaigns team
- Oversee and monitor effective and efficient administrative systems.
- Attend meetings as required.
- Complete the required training to comply with quality assurance processes
- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service



Key Relationships

- Project Lead
- Other project administrators
- Other project staff
- Clients



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Person specification

Essential Criteria

- The ability to commit to and work within the aims, principles and policies of the Citizens Advice service and the vision of Citizens Advice Cornwall
- Previous administrative experience
- Good interpersonal skills
- Skills in accurate word processing with a typing speed of 40 wpm
- Ability to work as part of a team and monitor and maintain standards
- Strong written and oral communication skills and experience of preparing correspondence, reports and reviews
- Good numeracy skills
- Ability to use IT to support all aspects of the work
- Ability to prioritise workload and meet deadline
- Strong understanding of confidentiality and data protection principles
- Ability to research, analyse, check and interpret information
- Undertake additional training and development as necessary

Desirable Criteria

- Experience of working with unemployed and inactive people
- Experience of working in ESF programmes and the reporting requirements
- Understanding of the voluntary and community sector and the challenges and opportunities facing the sector

In accordance with Citizens Advice national policy the successful candidate will be required to undergo screening for a basic criminal check (DBS). However, a criminal record will not necessarily be a bar to your being able to take up the job.

June 2022