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£WiseUp in the West Financial Capabilities Project Lead

A pilot project part funded by ESF



The role

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

The post holder(s) will be required to deliver training and one to one support to people from some of the most deprived areas in South and East Cornwall

- 18.5 hours per week
- Salary - £23,344 - £25,467
- Fixed term contract from October 2021 - January 2023
- Post based at one of the Citizens Advice offices in the South & East Cornwall but will involve travel and some work can be done remotely
- Full training provided
- Access to mental health and wellbeing support from Togetherall
- 20 days holiday, plus 8 days Bank Holidays.



Role profile



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Project delivery

- Recruit qualifying candidates to the programme and monitor their progress throughout their engagement
- Delivery small group training and 1:1 support to the qualifying candidates
- Work with the wider Citizens Advice service and other agencies to ensure that clients receive the required support to move them into training, volunteering or paid work
- Monitor outcomes of the clients to ensure the intervention is helping them move forward

Supervision

- Supervise Administrator to ensure all admin and reporting is carried out to an agreed standard
- Provide support, guidance and training to ensure that the administrator is clear about their role and responsibilities and have the capability and tools to carry them out
- Provide support, guidance and training to the wider Citizens Advice Cornwall team to ensure they understand the remit of the Financial Capabilities team and relate effectively

Administration

- Ensure the effective and efficient operation of our administrative systems
- Ensure accurate performance monitoring statistics and reports are available to meet contract and funder deadlines
- Monitor all targets associated with the project and put action plans in place where these are not being met
- Evaluate and develop the project and provide evidence of effectiveness
- Maintain complaints procedures in accordance with Citizens Advice Guidelines and our complaints procedure
- Participate positively and pro-actively in supervision sessions, team meetings and organisational wide activities
- Ensure all GDPR and data protection requirements are adhered to in all work for which the post is responsible

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.



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- Ensure full compliance with Confidentiality and Lone Working policies, GDPR, Safeguarding and ASK RE (Domestic violence)

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
- 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
- Represent the organisation as appropriate at Citizens Advice and other statutory, voluntary and commercial organisations, professional bodies and institutions.
- 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

- Chief Executive Officer – Line Managed by
- Project Administrator – Line Manager for
- Operations Manager
- Finance Manager
- Service and Project Leads
- Funders and stakeholders



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Person specification

Essential Criteria

- Recent financial capabilities advice experience
- Experience of delivering training and 1:1 support and guidance in a variety of ways – small and large groups, in person and remotely
- Willingness to work flexibly to meet client needs (potentially evenings and weekends)
- Ability to work with other agencies and bodies to identify clients and their needs and deliver the appropriate support
- Experience of giving feedback objectively and a willingness to challenge constructively
- Ability to arrange or provide training for team and for volunteers who would like to work support the project
- Demonstrable ability as an adaptable and effective communicator, delivering and accepting information at a variety of people levels (verbal, written, presentation).
- Fully conversant with Microsoft Office Suite including excel, word, outlook, PowerPoint and Teams. Self-reliant and able to problem solve independently
- Well-developed planning and organisational skills, with the ability to manage and prioritise own workloads and the demands to deliver on deadlines
- Ability to lead and work as part of a team and manage standards and workload of the team
- Strong understanding of confidentiality and data protection principles
- Demonstrate understanding of social trends and their implications for clients and service provision.
- Ability to analyse and extract relevant information for reporting purposes and collate into reports or proposals.
- Numeracy skills and the ability to work within established financial systems.
- 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
- Commitment to reflective performance and continuing professional development
- Willingness to work as part of a team or alone
- Ability to work on own initiative
- Ability to travel and work across Cornwall



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Desirable Criteria

- Experience of working with unemployed and inactive people
- Recognised training qualification – training can be provided
- 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.

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.

