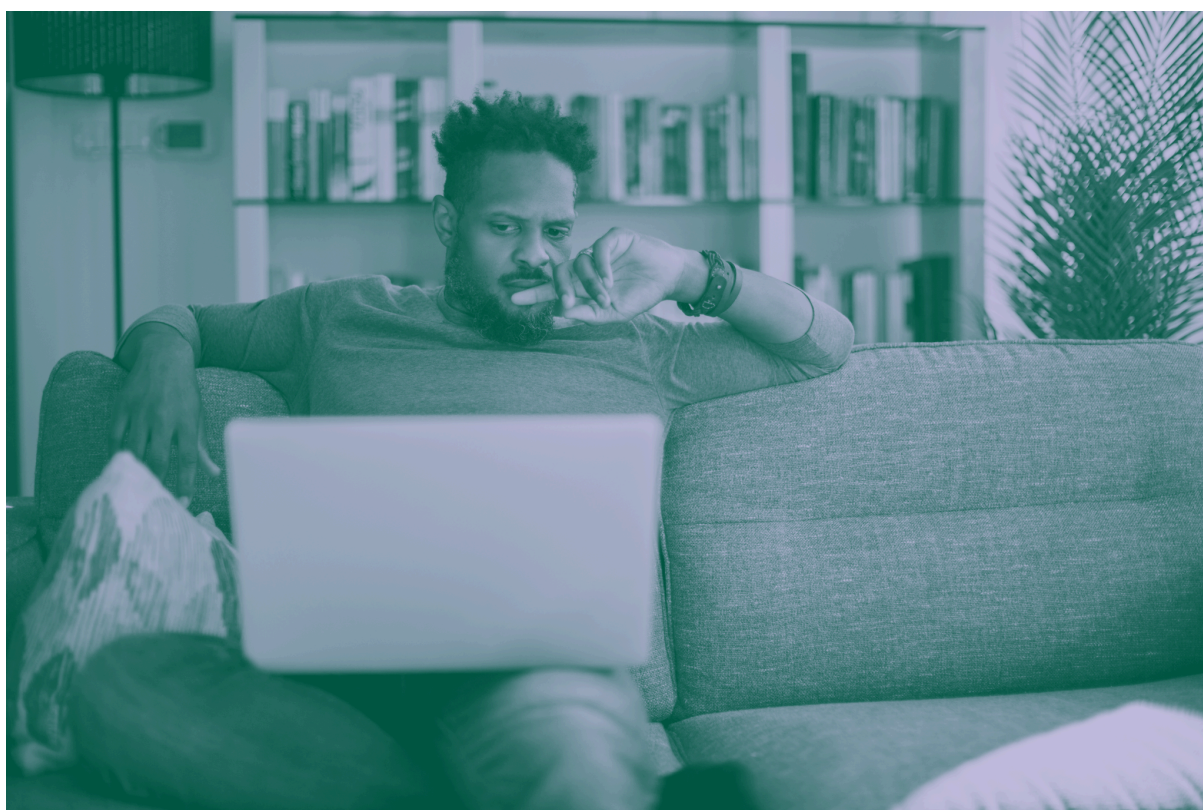




**Staffordshire
South West**

Financial Wellbeing Adviser

Job Pack



Job pack

Thanks for your interest in working at Citizens Advice Staffordshire South 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.

A message from our Chief Executive:

The work we do here at Citizens Advice Staffordshire South West can make a huge difference to clients seeking help and advice.

If you are passionate about supporting individuals and families in need and interested in joining a dedicated, professional team we would love to hear from you.



Claire Davis

Chief Executive Officer

Want to chat about this role?

If you want to chat about the role further, you can contact Lisa Hitchcock by emailing lisa.hitchcock@citizensadvicessw.org.uk or calling 07736924923

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.

What it's like to work here

As a charity, our community-based service has always strived to help anyone who needs it. We are well known, well established and a well-respected organisation that has grown and diversified over 85 years.

Citizens Advice Staffordshire South West has 90 volunteers and staff who work with over 10,000 people to address more than 30,000 issues every year, providing free, independent, impartial and high quality advice. Our service gives people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.

We provide advice services across the districts of Stafford Borough, Cannock Chase and South Staffordshire. We work in a blended way with a mix of home and office working. We care about our employees' mental wellbeing and ensure everyone can achieve a healthy, happy work-life balance.

We are committed to developing our staff and we work with our staff to support them with their personal and career development. We have a commitment to a culture of learning and work together to problem solve and share learning experiences.

We value diversity, promote equity and challenge discrimination wherever we find it, and through our research and campaign work, we speak up on the issues that affect people's lives.

You will be joining a dedicated, vibrant and talented team of people who are deeply passionate about services which improve people's lives.



The role

Reporting to: Head Of Service

Annual Gross Salary: £23,600 for trainee up to £25,000 dependent on experience

Location: A mix of office, outreach and some home based working across the districts of Stafford Borough, Cannock Chase and South Staffs.

Contract: Fixed Term until March 2029 with possibility of one plus one year extension.

Hours: 37 hours a week over 5 days. Contracted hours are distributed across the week to enable some flexibility. Core hours 9:30am - 3pm

Holidays: 35 days per year including bank holidays

Pension: Opportunity to be enrolled in the workplace pension scheme, subject to meeting auto-enrolment criteria.

Other benefits: Regular training opportunities, full support to carry out your role, opportunities for career progression.

The Role: This post is funded by Midlands Partnership NHS Foundation Trust's (MPFT) Community Mental Health Teams with close partnership working within their Integrated Mental Health Team (IMHT). The provisions of the service is to provide financial wellbeing advice and general advice services to clients with mental health problems. You will ensure the effective delivery of face to face

advice services to clients across Stafford Borough, Cannock chase and South Staffordshire Districts.

We want people who are passionate about giving an effective service to those most in need. You will need to demonstrate that you can engage skilfully with clients who are vulnerable and distressed and have proven skills at working in a busy environment.

You will be a highly motivated strong team player with excellent interpersonal and organisational skills. You will have the ability to understand written and oral information of some complexity; have good numeracy skills sufficient to compile accurate financial statements and calculate benefits; and, have effective oral and written communication skills for the purposes of negotiation and reporting.

You will be employed by Citizens Advice Staffordshire South West and work from MPFT sites and our office bases. You will be providing financial wellbeing advice and taking on some casework.

You'll empower clients with advice and information to improve their financial situation, as well supporting with referrals to other teams. You'll be passionate about putting our aims and principles into practice.

Role purpose: You will be responsible for;

Providing debt and welfare rights advice to clients.

Providing Financial Capability advice to clients.

To check eligibility and award letters, carry out routine benefits calculations.

Advise on available sources of income, including welfare benefits, grants, discretionary payments and other schemes.

Support clients to make claims for benefits

To challenge incorrect decisions and submit mandatory reconsiderations and appeals

Ensure quality standards are met while ensuring good case management and accurate case recording

Being able to provide case studies and data for reporting purposes

Undertake service delivery at Outreach venues as required. Take part in community events as required



Role profile

Advice work

1. Provide advice covering the full range of advice including Welfare Benefits and Debt and other areas of advice as appropriate.
2. Interview and assess client's problem(s) using sensitive listening and questioning skills, following agreed protocols through telephone and digital channels.
3. Provide practical and emotional support to enable individuals to help themselves to identify needs and issues from all financial worries and concerns.
4. Identify key information about the problem including time limits, key dates and requirements for urgent advice or action
5. Advise the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
6. Assess and agree to the appropriate level of service, taking into consideration the client's ability to take the next step themselves, the complexity of the problem.
7. Provide assisted information or signposting as appropriate
8. Research and explore options and implications so that clients can make informed decisions.
9. Negotiate with third parties as appropriate.
10. Ensure income maximisation through the take up of appropriate benefits.
11. Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation for Citizens Advice and MPFT.
12. Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.
13. Assist clients with other related problems where they are an

integral part of their case and refer to other advisers or specialist agencies as appropriate.

14. Assist clients to identify debts and deal with them appropriately.

15. Ensure that all casework conforms to the organisation's Office Manual.

Training and Professional Development

1. Keep informed of new and changing legislation relevant to the post and of local issues/policies.
2. Read the regular Citizens Advice updates and information items.
3. To attend and successfully complete MPFT training.
4. Attend learning events and carry out learning activities in line with Continuing Professional Development requirements.
5. Keep up to date with legislation, case law, policies and procedures relating to debt advice, and attend appropriate training; including reading relevant publications.
6. To identify and develop your own learning opportunities.
7. Participate constructively in team meetings, engaging with team members, sharing knowledge and good practice and supporting each other to problem solve.

Social Policy

1. Recognise the root causes of problems and contribute social policy evidence in line with the twin aims of the Citizens Advice service, highlighting issues of concern to disadvantaged groups and clients in general.
2. Participate in local and regional social policy initiatives.

Administration

1. Ensure that the client profile information, advice issue codes and information sources are accurately recorded
2. Be responsible for your own case management.
3. Maintain casenotes on MPFT case management system (RIO).

4. Write reports and case studies for the Senior Management team, Trustee Board or funder as and when required.

Quality

1. Continually meet the requirements of the quality framework and engage with Quality supervision and support services
2. Meet the Key Performance indicators and quality criteria relevant to the project. Including meeting specified individual targets.

Research & Campaigns

1. Assist with research & campaigns work by providing information about clients' circumstances through the appropriate channel.
2. Complete CA evidence forms as and when appropriate.
3. Contribute to local and national campaigns as and when required.
4. Alert other staff to local and national issues.

Equity and Diversity

1. Ensure that work undertaken reflects and supports the service's Equity and Diversity Strategy

IT Proficiency

1. Develop and maintain Information Technology proficiency to support your work requirements

Other

1. Comply with all the organisation's published policies and procedures, with attention to Health and Safety, Safeguarding, Confidentiality, GDPR and Data Protection, Home Working policies and Equity and Diversity.
2. Uphold the aims and principles of the organisation Undertake any other duties as might be reasonably required within the scope of the role..
3. To attend meetings within CASSW and external as required .

4. In addition to the above tasks and duties, the post holder will be required to undertake such other tasks and duties identified as being generally compatible with the post and the aims of CASSW.



Person specification

Essential Criteria

- ❖ A knowledge and experience of delivering advice services.
- ❖ A good working knowledge of debt and welfare benefit legislation
- ❖ To be able to support clients to address issues which affect their health and wellbeing.
- ❖ To be able to adapt the advice process to suit individual needs of service users
- ❖ Be able to establish working relationships with members of a multi disciplinary team
- ❖ Effective oral communication skills
- ❖ Effective writing skills to enable preparation of reviews, reports and correspondence
- ❖ Ordered approach to work and an ability and willingness to follow and develop agreed procedures.
- ❖ Understand the issues involved in interviewing clients.
- ❖ Numerate to the level required in the tasks.
- ❖ Ability to plan and organise your work.
- ❖ Ability to handle confidential information
- ❖ Ability to use IT in the provision of advice and the preparation of reports and submissions.

- ❖ Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
- ❖ Ability and willingness to work as part of a team.
- ❖ Ability to work independently.
- ❖ Demonstrate an understanding of social trends and their implications for clients and service provision.
- ❖ Understanding of and commitment to the aims and principles of the Citizens Advice service and its equality and diversity policies.
- ❖ An understanding of equality and diversity and its application to the provision of advice.

Desirable quality and skills

- ❖ Have an understanding of the needs of clients with mental health problems
- ❖ Experience of advice work .
- ❖ Experience of working in the voluntary sector would be desirable
- ❖ Experience of working with volunteers
- ❖ The ability to drive and have access to a car

Reasonable adjustments

Application Stage: applicants are encouraged to let us know if they require any reasonable adjustments to support them in the application process.

Interview Stage:

Candidates will be asked about any reasonable adjustment that they might require during the interview process. This may include, for example, written version of interview questions, use of specialist software or additional time to complete an exercise, use of a sign language interpreter if a candidate is deaf.

On Appointment:

Any necessary workplace adjustments you may require will be discussed and agreed if appropriate and will be put in place to support you in your new role.

Disclosure and Barring Service Checks (DBS)

Some Citizens Advice positions may require the successful candidate to undergo a DBS check, this will be specified within the job pack

Criminal Convictions

Anyone who applies to work within Citizens Advice will be asked to disclose details of unspent convictions during the recruitment process. Having a criminal record will not necessarily bar you from working for Citizens Advice – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, our national policy is that we will not take on anyone with a conviction for a sexual offence against a child vulnerable adult, regardless of when the offence took place.

How to apply:

Closing Date: 7th November 2025 12 noon

Interview date: week commencing

Apply here: send your CV with a covering letter to
recruitment@citizensadvicessw.org.uk

Or post to Lisa Hitchcock

Citizens Advice Staffordshire South West

1a and 1b St Mary's Place, Stafford, ST16 2AR