

**Financial Capability Project Lead**

**Advice and Financial First Aid (AFFA) Project**

Job pack

Thanks for your interest in working at Citizens Advice Swindon. 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:

* How Citizens Advice Swindon works
* The role profile and personal specification
* Terms and conditions
* What we give our staff

**Want to chat about this role?**

If you want to chat about the role further, you can contact Claire Newport by emailing [chiefofficer@swindon.cabnet.org.uk](mailto:chiefofficer@swindon.cabnet.org.uk)

**Closing date for applications: 31st May 5pm**

**Interview dates: 7th June 2022**

**How Citizens Advice Swindon works**

Citizens Advice Swindon operates a multi-channel service offering advice over the phone, by email and face to face. We currently operate from 2 permanent locations in Swindon, as well as outreach in various locations.

Our main office is situated in Sanford House, Swindon. The building operates as a voluntary sector hub and includes Swindon Mind, Swindon Carers Centre, Healthwatch Swindon, Swindon Advocacy Movement and Wiltshire Law Centre.

We have changed our operation significantly in the last 16 months and staff work both in the office and remotely from home.

We currently have a team of 22 paid staff and 40 volunteers delivering a full generalist service with casework in debt, benefits and immigration.

  **The role**

This is a new project primarily responding to the financial difficulties and insecurities facing Swindon residents brought about by the Cost-of-Living Crisis. The purpose of this role is to lead the implementation and development of our new Advice and Financial First Aid team. You will develop strong partnerships and embed the project at the heart of the community to ensure people can access good advice when they most need it.

You will champion Financial Capability in Swindon and promote opportunities to embed financial inclusion across the borough.

You will develop training and networking opportunities for frontline workers and other partners that will establish a new network of Advice and Financial First Aiders, with the skills and knowledge to identify advice issues and empower people to manage their money effectively through making informed financial choices.

**Responsible to**: Chief Executive

**Responsible for**: 2 x AFFA Advisers, 1x Money Mentor, Volunteer AFFA’s

  **Role profile**

**Plan, develop and deliver financial capability activities**

* Identify and develop training materials to deliver the Advice & Financial First Aid (AFFA) skills programme, with a focus on money management, income maximisation, using bank accounts, options for borrowing and saving, energy usage, scam awareness and dealing with debt, to frontline workers and AFFA volunteers
* Work with partner agencies to identify frontline workers to attend AFFA skills training and network meetings.
* Coordinate and deliver group training activities within the community that focus on AFFA skills eg. Money management, dealing with debt, borrowing and saving, energy efficiency, Income Maximisation etc
* Ensure systems are in place to collect feedback on what participants have learnt and been able to put into practice.
* Collect and review feedback on participate outcomes and the quality of the service.

**Project Coordination**

* Lead implementation of Citizens Advice Swindon’s AFFA project plan.
* Monitor progress against the project plan on an ongoing basis and provide reports on agreed objectives and metrics.
* Collect, collate and present project monitoring and evaluation data.

**Marketing and relationship building**

* Promote the project and carry out marketing activities such as writing press releases or delivering presentations.
* Attend external events and meetings to promote the project and champion Financial Capability
* Establish, develop and maintain a range of partnerships to reach clients and gain support for the project.
* Devise and implement a communications plan for the project.
* Assist in the compilation and submission of funding bids to extend and develop the project.

**Staff Management**

* Lead the recruitment, training and development of a team of AFFA staff and volunteers to assist in the delivery of the project.
* Line management of the AFFA Advisers and Money Mentors
* Identify learning and development needs of designated staff.
* Create a positive working environment in which equality and diversity are well-managed, dignity at work is upheld and staff perform optimally.

**Research and Campaigns**

* Monitor trends in all enquiries relating to Financial Capability, debt and cost of living to identify potential issues and trends.
* Ensure the organisation engages with national and regional research and campaigns projects in relation to financial capability and the cost of living.
* Ensure outcomes of the organisation’s work including engagement in campaigns are reported to key stakeholders.

**Professional development**

* Identify and implement plans for your own training and development needs.
* Keep up to date with developments in financial capability, available training materials and other resources.
* Keep up to date with legislation, policies and procedures relating to financial services and undertake appropriate training

**Other**

* Establish and maintain effective and efficient administration systems for the delivery of the project.
* Use IT for statistical recording, record keeping and document production.
* Carry out administrative tasks related to the role as well as other appropriate tasks requested by the Chief Executive, to ensure the delivery and development of the service.

  **Person specification**

**Essential Criteria**

* A passionate champion of all aspects of financial capability and financial inclusion
* Knowledge and understanding of financial education work, a basic knowledge of personal finance and budgeting issues.
* Awareness of the holistic nature of financial capability guidance, and the many areas that are linked, for example:
  + banking, debt, benefits, credit and borrowing
* Awareness of the ways that life events can affect an individual’s circumstances, for example:
  + Ill health, Change in employment status, Bereavement, Divorce, separation and relationship breakdown
* Proven ability to manage a project – including monitoring progress against objectives and working with a range of partners.
* Experience of establishing and developing partnerships with other agencies and joint working.
* Excellent interpersonal skills, including the ability to relate and work with a large variety of different people
* Ability to set up and use systems to collect, collate and share information about project achievements and outcomes.
* Ability to recruit, induct, train and supervise a small team of volunteers and staff.
* Excellent verbal and written communication skills.
* Good maths and IT skills.
* Be non-judgmental and respect views, values and cultures that are different to your own.

In accordance with Citizens Advice national policy, the successful candidate may be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.

  **Terms and conditions**

Salary: £27,220 pro rata (£22,070 actual pay)

Hours: 30 hours per week (may be occasionally required to attend events outside of normal office hours but time off in lieu arrangements in place)

Contract: Initially a 2-year fixed term contract

Location: Hybrid working from home, office and in the community

**  What we give our staff**

* 25 days paid holiday per year plus Bank Holidays pro rata, and a discretionary 3 additional days between Christmas and New Year
* 5% employers contribution to workplace pension scheme with 3% employees contribution
* A commitment to Continued Professional Development and payment of membership fees to professional bodies where this will enhance your work
* Access to Citizens Advice national training programme
* Opportunity to work as part of a national network of Citizens Advice offices
* Employee Assistance Programme including 24hr helpline support and legal advice
* Mental Health and Wellbeing Support from Togetherall
* Perks and savings via our partnership with Lifeworks these include savings on cinema tickets, giftcards and cashback on some purchases