

**Financial Wellbeing Adviser -** **Generalist**

**(Trainee position considered)**

Job pack

Thank you 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 person 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 us by emailing ameeta.bassi@caswindon.org.uk and we will organise a time to answer your queries.

**Closing date for applications: Monday 28th July 2025**

**Interview dates: Wednesday 6th August 2025**

As a member of the Citizens Advice service, Citizens Advice Swindon (CAS) provides free, confidential, independent and impartial advice and information to everyone on their rights and responsibilities. Whoever they are, whatever the problem. We value diversity, promote equality and challenge discrimination.

**Our values**

**We’re inventive** - We’re not afraid of trying new things and learning 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**

**We’re local**

We have offices in Swindon and deliver outreach sessions for clients across the borough. Last year, we supported over 8,500 clients with more than 27,000 issues, including Welfare Benefits, Money Advice, Energy, Housing and Immigration.

**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.

**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.

No one else sees so many people with so many different kinds of problems, and that gives us a unique insight into the challenges people are facing today.

**What’s it like at Citizens Advice Swindon?**

We operate a multi-channel service offering advice over the phone, by email and face to face. Based in Sanford House in Swindon; a voluntary sector hub that includes Livewell Swindon, Swindon Mind, Swindon Carers Centre, Healthwatch Swindon, Swindon Advocacy Movement, Wiltshire Law Centre and more.

Our current staff team is made up of 30 paid staff and over 50 volunteers.

We work in a blended way with a mix of home and office working depending on the requirements of the role. We care about our employees' mental wellbeing and want to 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 working together to problem solve and share learning experiences.

We value diversity, promote equality 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, and talented team of people who are deeply passionate about helping individuals and communities, and delivering services which improve people’s lives.

  **The role**

| **Role** | Generalist Adviser - Financial Wellbeing  (Trainee position considered for the right candidate) |
| --- | --- |
| **Salary** | up to £25,700 depending on experience |
| **Hours** | 37 hours per week (may be occasionally required to attend events outside of normal office hours but time off in lieu arrangements in place) |
| **Location** | Swindon |
| **Reporting to** | Financial Capability Manager |

The role focuses on helping people navigate challenges related to welfare benefits, debt, housing, and income maximisation.

You will be part of a team championing Financial Wellbeing in Swindon and promoting opportunities to embed financial inclusion across the borough.

Delivering outcomes focussed advice helping people to find a way forward with the problems they face

**Key Work Areas and Tasks**

**Advice & Casework**

* Provide information and advice (generalist level) with a particular focus on welfare benefits, income maximisation, budgeting support, fuel costs, and preventative work
* Interview and advise clients face to face in the office, at a variety of outreach locations and over the phone.
* Work with clients (individually or in small groups) to develop their knowledge, skills and confidence in managing their money effectively and making informed financial choices.
* Supporting clients from diverse communities, using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to address
* Empower clients to take action to resolve their problems. This might include supporting clients in drafting or writing letters, making phone calls, or referring the clients to another organisation
* Research local solutions (eg food bank vouchers, fuel vouchers, local grants and assistance funds)
* Be a champion for all aspects of Financial wellbeing and Inclusion within the Borough, working with partners to embed financial capability knowledge.
* Ensure that all work conforms to the Citizens Advice Quality Standard.
* Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
* Deliver energy efficiency advice (training given)

**Project Work**

* Attend external events and meetings to promote the project and champion Financial Wellbeing, these may be outside of normal office hours.
* Develop literature to promote the project and carry out other marketing activities such as case studies, articles or delivering presentations.
* Help develop and maintain a range of partnerships to reach clients and gain support for the project.

**Research and Campaigns**

* Monitor advice enquiries, contributing to research and campaign projects locally, and across the Citizens Advice network

**Professional development**

* Undertake role appropriate training as agreed with line manager
* Attend relevant internal and external meetings as agreed with the line manager.
* Attend supervision sessions with your line manager at agreed periodic intervals.

**General Duties**

* Work cooperatively with colleagues and encourage good teamwork, clear lines of communication and common practices within the organisation.
* Contribute to a positive working environment in which equality and diversity are championed, dignity at work is upheld and staff and volunteers perform optimally.
* Work to foster good relationships with external organisations.
* Promote the aims, policies, and membership requirements of the Citizens Advice service and Citizens Advice Swindon.
* Abide by health and safety guidelines and share responsibility for your own safety and that of colleagues.
* Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the advice service.

**Person specification**

**Essential**

1. Be confident in assessing complex issues and working with people facing various challenges in order to meet the needs and demand of the service.
2. The ability to manage and support others during times of crisis, be resilient and able to manage difficult and emotional conversations well.
3. Ability to use sensitive listening and questioning skills to get to the root of the issues and empower clients.
4. Ability to progress a client’s situation and demonstrate problem solving skills.
5. An awareness of the social issues which cause disadvantage and inequality
6. A ‘can do’ attitude with the ability to adapt to changing situations
7. Excellent interpersonal skills, including the ability to relate and work with a large variety of different people
8. Ability to work to set targets and manage your time accordingly
9. Good IT and digital skills, with the ability to work independently using a range of applications
10. Ability and willingness to work as part of a team
11. Ability and willingness to commit to, and work within the aims, principles and policies of the Citizens Advice service

**Desirable**

1. Experience of providing generalist level advice on issues such as Welfare Benefits, Debt, Housing and Employment
2. Certificate in Generalist Advice Work or equivalent qualification.

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: up to £25,700 depending on experience

Hours: 37 hours per week

Location: Hybrid working a mixture of office and outreach, with some home working considered once you have achieved independence in the role.

**  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 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
* Perks and savings via our partnership with Telus Health, these include savings on cinema tickets, giftcards and cashback on some purchases