



Money Advice Supervisor

Job Pack

Thank you for your interest in working at Citizens Advice Bury & Bolton. This job pack should give you everything you need to know to apply for this role and what it means to work for the Citizens Advice service.

In this pack you'll find:

- About us
- Our mission and purpose
- Application process and key dates
- The role profile and person specification
- Our approach to equality and diversity.

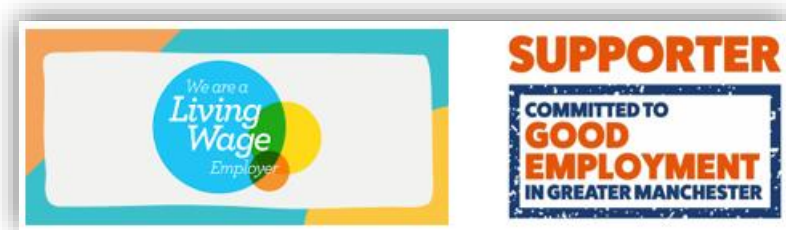
Citizens Advice Bury & Bolton (CABB) – About Us

We are a dedicated local charity committed to offering free, confidential, and impartial advice, information, and support to individuals across Bury & Bolton (with some out of area services). We value diversity, promote equality and challenge discrimination.

We are committed to putting equality and equity at the heart of everything that we do, with the overarching aim of being the go-to charity for anyone across Bury & Bolton in need of help, to find a way forward. This means we look at improving access, treating people with empathy and promoting an inclusive working environment for all of our colleagues.

As an individual charity, the Board of Trustees have overall responsibility for the strategic direction and oversight of CABB, delegating day to day management and delivery to the Chief Executive Officer and wider Senior Leadership Team, consisting of:

- Deputy CEO & Head of Advice
- Head of People & Operations.



We are proud to be a **Real Living Wage Employer**.

We are a **Supporter of the Greater Manchester Good Employment Charter** – a voluntary membership and assessment scheme which has been created to improve employment standards across all GM employers, regardless of size, sector or geography. We are working towards becoming full members.

You can find out more about us via:

- The [Citizens Advice Bury & Bolton](#) website
- The [national Citizens Advice](#) website and the Citizens Advice [Campaigning site](#).

Whether individuals are facing a single issue or a complex set of problems we provide personalised one-to-one advice.



We do more than fix immediate problems, our advice makes a significant difference to the people we help.



Client Comments

"My adviser was very supportive and friendly. Without Citizens Advice I don't know where I've have gone for help."

citizens advice Bury & Bolton

"The service was really helpful. No one else gave me the help or time that Citizens Advice did."

citizens advice Bury & Bolton



We are the people's champion.

We exist to shape a society where people face far fewer problems.

We're driven:

- By our ambition to make things better for people, individually and collectively as part of the Citizens Advice network.
- By the power of high quality, independent advice to help people solve their problems.
- To change the underlying causes of problems, through working in partnership with local, regional and national organisations.

As a local service, we align ourselves to the Citizens Advice, organisation wide, missions:

- 1) Provide advice fit for the future** – we'll be there for people when they need us, in the ways that help make the biggest impact; such as providing support due to the continued cost of living crisis and ensuring income is maximised. Our specialist areas of advice focus on supporting individuals and communities who are most vulnerable and those who are locked out of the welfare system, or on the verge of being excluded.
- 2) Close the gap** – we'll work to end the disparities in access and experience for marginalised people, through proactive partnership working, community engagement and overcoming barriers to access.
- 3) Take early action** – we'll endeavour to prevent more people reaching crisis by addressing problems earlier.

The Vacancy

Thank you for your interest in our **Money Advice Supervisor** vacancy.

The Application Process

Stage 1

To apply, please submit your CV & a covering letter to jobs@cabb.org.uk, by the closing date/ time.

Please ensure your CV includes the following information:

- Your contact details (address, contact number and email address)
- Information about your education history
- Information about your career history
- Details of any professional qualifications, including memberships

Within your covering letter, please answer the following questions (in no more than 1,000 words), giving examples from your experiences where relevant:

- 1) Why do you want to work at Citizens Advice Bury & Bolton?
- 2) What will you bring to the role?
- 3) Detail your skills, knowledge and experience considering the criteria in the person specification.

Should a CV and covering letter not be included, your application for the role will not be taken forward.

Unfortunately, we are unable to provide feedback on applications which are unsuccessful at stage 1.

Stage 2

Pending meeting the required standard in responses at stage 1, you will be invited to an in-person face-to-face panel interview. During the panel interview, you may be asked to deliver a presentation and/ or complete a written assessment (your invite will confirm interview process/ activities).

Key Dates

Closing date	Monday 7 th October 2024 at 10am
Interview date	Week beginning Monday 14 th October 2024. The interview will contain an assessment

Want to chat about the role?

If you have any questions or would like an informal chat about the role, email jobs@cabb.org.uk. A member of the recruitment team will respond/ arrange a suitable time, as required.

We wish you every success in your application, and thank you for taking the time to consider joining us.

The Role

Job title	Money Advice Supervisor
Reporting to	Money Advice and Energy Services Manager
Salary	£26,975 - £29,174
Contract	Permanent
Hours	Full time (35 hours per week). The post-holder is expected to work flexibly, with advance notice.
Location	This is a hybrid role between in-office/ home working. There is expectation to be physically present in office 60% working week, on average.

Role Purpose

Citizens Advice Bury & Bolton (CABB) is a leading provider of legal advice and information, supporting thousands of clients every year. We are a busy, client focused and dynamic service with a track record of delivering high quality advice. Our services are delivered between 8am – 6pm. Postholders will be expected to actively contribute to service delivery rotas between these times.

Our Money Advice team provide a professional Money Advice service, which enables clients to look at income maximisation, budget planning, enforcement options open to their creditors and to find a solution for their debts

The Money Advice Supervisor will have a detailed understanding of the money advice system and funder requirements. You will be required to work across all advice channels including digital, face to face and telephone. You will also be expected to provide technical support to our Money Advice team.

The Money Advice Supervisor will undertake the following additional responsibilities:

- Ensure high quality advice by actively listening to/ shadowing advice sessions and file reviews.
- Develop team expertise in line with individual training plans and supervision
- Work towards, and maintain technical supervisor standards
- Support and actively contribute to the coordination of service delivery rotas.

To be successful in this role you will be able to work with a high level of accuracy and attention to detail, exhibit excellent listening and questioning skills and to present and conduct yourself in a professional and courteous manner with all clients seeking support.

You will liaise with contacts across various agencies to find resolutions for escalated issues and you will understand the importance of security and data protection to ensure all data is protected in line with GDPR legislation. You will have a good standard of numeracy to complete budget plans to aid the advice process and be proficient in the use of computer packages with a working knowledge of Microsoft Office. You will have an open and friendly demeanour and be able to work as part of a diverse team.

At CABB, we value diversity, promote equality and challenge discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled, Black, Asian and Minority Ethnic (BAME) as these communities are currently under-represented throughout Citizens Advice. We also welcome applications from, LGB and Trans and non-binary candidates.

Role Profile

Key accountabilities and responsibilities	Key elements & tasks
Supporting Clients	Interview clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities
	Complete budget plans in line with the standard financial statement guidance.
	Identification of emergency advice issues, and advice on how to move forward with those issues
	Identification and assessment of eligibility for grants and other one-off support, signposting/ referring as appropriate

	Determination of whether a food/ fuel bank referral is required
	Research and explore options and implications so that clients can make informed decisions
	Act for the client where necessary using appropriate communication skills and channels
	Ensure that all work meets quality standards and the requirements of the funder
	Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
	Support our research and campaigns work through various channels including case studies, data collection and client consent
Working as part of a team	Provide day to day support to the Money Advice team and assist with any training needs
	Conduct monthly independent file reviews on advisers cases based on their level and ability, providing timely feedback
	Conduct 1:1 supervisions for members of the team as required
	Be an active member of the wider team, acting and supporting colleagues in a collaborative way
	Support and actively contribute to the coordination of service delivery rotas
	Promote best practice across the team
	Regularly provide technical support & supervision to colleagues as and when required
	Provide feedback to line manager on performance issues/ training needs of advisers as and when arise

Performance, Personal Management and Administration	Take ownership for monitoring own workload e.g. proactively reviewing when new cases are taken on, progress on current cases, outcome of completed cases and quality control, with minimal supervision
	Be responsible for performance management at an individual level through: self-management; delivery of goals and tasks set; targets and outcomes; and reporting progress
	Undertake file reviews and quality of advice assessments, in line with organisation/ contractual requirements and expectations as required
	To comply with operational management systems of supervision, objectives, appraisal and induction
	To comply with data collection procedures and reporting to ensure effective recording of performance monitoring, outcomes and client information
Service Development	To assist with the development of the service locally, regionally and nationally, publicising work as and when necessary
	Work with colleagues to maintain a positive working and learning environment, in which equality and diversity are well managed, dignity at work is upheld and volunteers achieve their full potential
	Carry out other tasks within the scope of the post to ensure the effective delivery and development of the role.
People Management and Equality, Diversity & Inclusion	Provide support and expertise to the Money Advice team.
	Contribute to a positive “can do” culture in which all team members (paid and voluntary) are committed to achieving excellence and are supported to develop and thrive in their roles.

	Contribute to a positive working environment where equality and diversity are well-managed, dignity at work is upheld and staff can continue to learn, grow and perform.
Training	To ensure through reading, training and consultancy, that your own level of knowledge around Money Advice law is up-to-date and that this is disseminated as appropriate
	To identify your own training needs in conjunction with designated line manager and be prepared to undertake appropriate training in line with your training and progression plan
	Work towards CertMAP qualification, where qualification held, ensure CPD requirements are met on an annual basis
	Deliver training (internally and/ or externally), either through formal training sessions, or 'on the job' coaching to colleagues
Other duties and responsibilities	Liaise, as appropriate, with relevant outside agencies (voluntary and statutory), other Local Citizens Advice offices and other stakeholders
	Be an active member of the wider team, acting and support colleagues in a collaborative way
	To present a professional appearance, help maintain an orderly working environment, and act at all times to uphold the good reputation of Citizens Advice
	To comply with all published organisational policies and procedures
	Maintain confidentiality at all times, in line with statutory requirements and comply with all organisational policies and procedures.

	Effectively use systems in place to manage emails, calendars, chat platforms and any other required systems and services.
	Work flexibly to undertake such other reasonable duties and responsibilities
<p>Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the job and is not included to be an inflexible list of tasks.</p> <p>The Citizens Advice Service is a fast-moving organisation and therefore an employee's duties may be varied from time to time. The post holder accepts that they may be required to work flexibly and undertake any other work or duties as may reasonably be required, within the scope of and commensurate to the nature of the post.</p>	

Person Specification

(all criteria are essential unless otherwise indicated)

Experience (through paid or voluntary work)
Minimum 1 years experience of delivering Money Advice in a social welfare context
Experience of working within an advice and information organisation within the third/charity sector
Experience of engaging with clients across a range of channels, including webchat and telephone – sensitive and empower clients
Experience of flexible working, according to business need, while balancing multiple priorities and managing a high workload
Experience of flexible working according to business demand
Experience of communicating effectively, both orally and in writing, with a wide range of people
Experience of accurately drafting letters, reports and complex applications and presenting work in a clear layout

Experience of working towards targets

Knowledge and Understanding

Comprehensive knowledge of local and national advice service strategies and a thorough understanding of poverty, advice issues and the problems people face; and the ability to translate this understanding into solutions for people

Demonstrable understanding and awareness of the relationship between Money Advice and other areas of Social Welfare Law

Demonstrable understanding of the emphasis on quality of advice and related advice checks

Demonstrable understanding of funder requirements

Literate and numerate to the level required by the tasks

A thorough understanding of professional boundaries and the issues surrounding confidentiality, data protection and information assurance

Qualifications and Training

A commitment to continuous professional development (CPD), including a willingness to develop knowledge and skills in required areas

Relevant CertMAP qualification or the ability to work towards this

Skills and Abilities

Ability to interpret regulations and explain them to clients and colleagues and to produce clear advice and empowerment

Ability to work on own initiative, proactively manage a varied workload, ensuring deadlines are met

Ability to contribute as a member of the team but also work on own initiative and without close supervision

Effective written and verbal communication skills, including the ability to deal appropriately with a range of people via face-to-face, telephone and digital communication methods

The ability and willingness to liaise with outside agencies, and build effective working relationships with local and regional partners

Excellent verbal, written & numerical skills

Willingness and ability to commit to a rota within the required service delivery hours.

Additional Factors

Ability and willingness to work as part of a team and a commitment to collective team responsibility
Understanding of, and commitment to, the aims and principles of the Citizens Advice service in which equality and diversity is embedded throughout
Proven ability to use cloud-based systems and IT packages, including, word processing, spreadsheets and email (maintain one or more electronic diary/diaries), and the ability to use or learn to use other packages as necessary
Commitment to continual professional development, including a willingness to develop knowledge and skills in advice topics
Awareness that Citizens Advice clients are at the heart of everything we do

What we give our staff

We value the people who work here. As well as things like annual leave and our workplace pension, working at Citizens Advice means getting access to several benefits. [Citizens Advice Bury & Bolton employee benefits package.](#)

Equality and diversity at Citizens Advice

Equity, Diversity and Inclusion (EDI) is of strategic importance within the organisation and recognised as integral to all we do as a service.

Central to pursuing our EDI mission is building diverse and inclusive teams in which everyone has a sense of belonging. We believe inclusion is a social justice issue - a principle that underpins our EDI work. To that end, we particularly welcome applications from people we would like to see better represented in our organisation and sector - people of colour, LGBTQ+ people and disabled people. We follow the social model of disability.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

Additional information

Please be aware that Citizens Advice Bury & Bolton is not a sponsoring organisation. Therefore, the successful applicant must already possess the right to work in the UK or

be able to secure the right to work in the UK independently. Verification of your right to work will be undertaken for successful candidates.

Please see the [CABB website](#) for information on the following:

- Disability
- Entitlement to work in the UK
- Diversity monitoring
- GDPR: How we will use your information
- References
- Criminal Convictions/DBS.