



# BBO Breakthrough Money Mentor

## Job pack

Thanks for your interest in working at Citizens Advice South Warwickshire. 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:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice South Warwickshire
- 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 Sunita Nega by emailing [sunita.nega@casouthwarwickshire.org.uk](mailto:sunita.nega@casouthwarwickshire.org.uk)

## 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.

# How Citizens Advice South Warwickshire works

## **Our people**

Citizens Advice South Warwickshire has a Trustee Board of twelve people who are all volunteers. Our Trustees bring a wide range of professional skills and knowledge and insight of the district to the planning of the service. The Trustees, in conjunction with the CEO, are ultimately responsible for setting the strategy and budget for the service. Day to day running and further development of the organisation is the responsibility of the CEO who, alongside a senior management team, oversees the delivery of our services.

CASW has 37 paid staff members (approx 20 FTE) and is proud to have in excess of 120 volunteers working in various roles. These roles include reception and administration, generalist advice, supervisors, money advice, research and campaigns work, grant finder, financial capability, money mentors, IT support and more. These volunteer roles have expanded in recent years and the service is actively developing volunteers to support its offer.

CASW operates from two main locations, in [Leamington Spa](#) and [Stratford-upon-Avon](#) town centres. In order to reach people who find travelling around our large urban and rural catchment area difficult, we have outreach offices in [11 locations around the district](#). We also deliver advice and information by telephone from the Stratford-upon-Avon office, and a home visiting service for those who would otherwise find access difficult.

## **Our clients**

On many indices of deprivation South Warwickshire can be defined as a low need / high income area. This masks significant pockets of deprivation, rural challenges of isolation, access to services and work, significant fuel poverty and affordability, especially in relation to housing.

## **The difference we make**

We make an amazing difference to the lives of the people of South Warwickshire. What we do is often life-changing and sometimes life-saving. In 2019-20 we delivered our advice and advocacy to over 6,200 people and advised on over 32,000 issues.

Factors impacting on people's lives include welfare benefit changes, debt, housing repossessions and local issues such as transport and the high cost of housing in our area. We work with local authorities, third sector partners, housing providers and many other agencies to mitigate the effects of sickness, bereavement, unemployment, disability, relationship breakdown and many other issues people face.

Benefits and debt are the two highest demand advice areas for our service followed by housing and employment. There has been a sharp increase in the number of people seeking help following a decision to decline or not renew disability and incapacity benefits. We are finding that this is a particular issue faced by those with mental health issues.

Over the last 5 years we have seen a marked increase in the prevalence of priority debts such as Council Tax and rent arrears and after seeing a significant reduction of unsecured credit over this period we are now once more witnessing growth in the numbers of people seeking advice with these debts.

As discussed above, housing and threatened homelessness is also a significant and growing problem. In 2019 - 20 we advised over 300 families facing repossession action.

### **Our funding and projects**

We have a wide range of funding sources. This includes income from Warwickshire County Council, Warwick and Stratford District Councils and a number of town and parish councils. This income is awarded via direct grants and through commissioned contracts.

We have also been very successful at drawing down further income from grant and project funding bodies including: the Big Lottery Fund, Henry Smith Trust, Oken Trust, Orbit Housing, Money Advice Service and many more. This income is approximately three times the funding from local authorities.

### **Our partnerships**

We held an exceptionally successful multi-agency event in November 2017. The event looked at how to better support our communities in partnership with funders and other partners. The success of this event helped to position our service at the centre of all of those working to achieve positive, long-term outcomes for the people of South Warwickshire.

### **Our local research and campaigns**

The stories our clients tell us provide us with a unique insight into the problems faced by people living in South Warwickshire. We are able to spot developing trends and this helps us to create campaigns and speak up for our clients to those in decision-making roles. By raising issues nationally we can create a public debate, change things for the better and help many more people than those that contact us.

We are currently working locally on issues around access to public transport in rural areas; the reasons why people use food banks; the impact recent welfare benefit changes have had on income and access to disability benefits. More information about Citizens Advice national campaigns can be found on the national website. [www.citizensadvice.org.uk](http://www.citizensadvice.org.uk).

Our R&C team are also working with clients on the co-design of our service delivery. This has helped us to understand and remove potential barriers to our service in relation to access.

### **Our website**

- Please visit our website for further information about our service.  
[www.casouthwarwickshire.org.uk](http://www.casouthwarwickshire.org.uk).

# Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

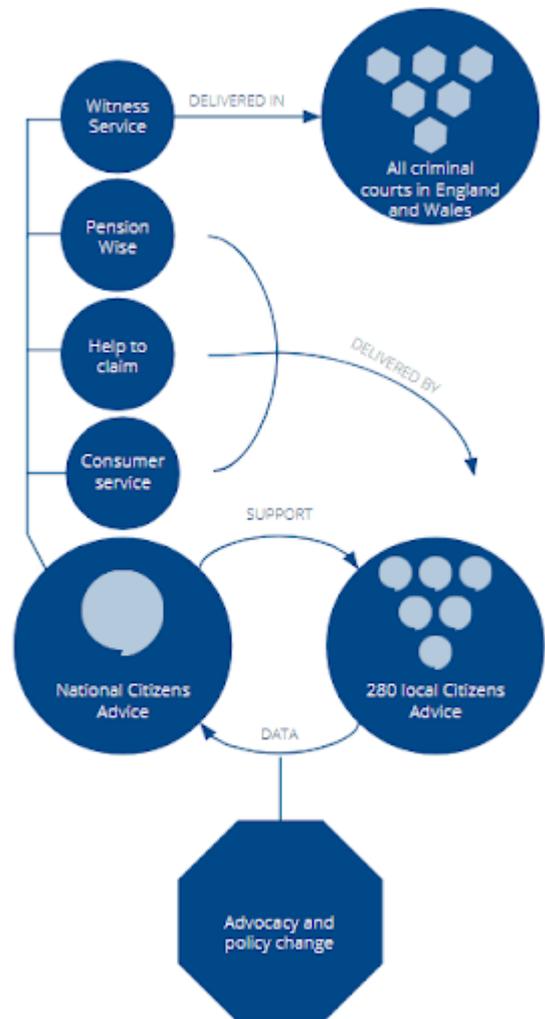
This role sits our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.





## The role

Job role: BBO Breakthrough Money Mentor

Hours: 14.5 hours per week

Pay: £25,295 (FTE based on 37 hours per week) pro rata depending on experience.

Location: The post holder/s will be required to visit clients at outreach locations and home visits across Warwick District. Based at our Leamington office. Flexible working is required. (subject to Covid19 restrictions on our service)

CASW is looking to recruit a money mentor for our Breakthrough project. Breakthrough is a joint ESF/National Lottery Community funded programme that intends to provide intensive support to beneficiaries to address the financial barriers they face to gaining and sustaining employment and taking a full and active role in their community. The programme will be delivered across Coventry and Warwickshire.

The role of the Money Mentor is to provide intensive support to beneficiaries to address financial barriers helping them to be better able to plan for the future, work towards gaining and sustaining employment and improving self-esteem and confidence to take a full and active role in their community.



## Role profile

1. Identify eligible participants targeting the unemployed and economically inactive members of the community and register them on the programme
2. Ensure all relevant paperwork is completed and signed by the participant
3. Ensure all necessary evidence of the participants eligibility to join the programme is copied
4. Support participants to develop and personal action plan
5. Support participants to engage with other organisations/partners who provide services to help them achieve their goals

6. Provide on-going intensive support, review the participants progress and ensure any additional support needs are addressed / arranged
7. Actively support, encourage and motivate people to adopt positive changes to their lives
8. Ensure income maximisation through the take up of appropriate benefits
9. Support participants to build their money management skills
10. Support participants to manage debts where appropriate
11. Negotiate with third parties where appropriate
12. Keep accurate records of the activities covered with the participants as required by the programme funders and follow guidance in the Programme Procedures Manual
13. Submit reports and statistics to Programme Support Officer
14. Keep up to date with developments in financial capability work
15. Keep updated on relevant legislation
16. Attend relevant internal and external meetings as agreed with your line manager
17. Prepare for and attend supervision meetings, annual appraisal and team meetings as appropriate
18. Use IT for statistical recording , record keeping and document production
19. Keep up to date with the programme's policies and procedures
20. Maintain close liaison with relevant external organisations
21. Abide by health and safety guidelines and share responsibility for own safety and that of others
22. To ensure that the aims, principles and policies of the Breakthrough programme and the wider Citizens Advice Bureau Service are upheld
23. To demonstrate a personal and professional commitment to the "Stand up for equality" strategy, and the Citizens Advice Service definition of equality, "Our common humanity makes us equal in worth, dignity and rights".
24. To contribute to the programme's sustainable development activities
25. To perform any task, commensurate to the role as directed by the Programme Lead; to facilitate any identified developments required by the programme to ensure continuing capability and effectiveness



## Person specification

1. Must be experienced in Financial Capability Work and have an understanding of the difference between financial capability work and debt advice
2. Must be experienced at working remotely over a wide area
3. Excellent communication skills; confident in talking to individuals
4. Experienced at delivering work with set targets / outcomes, with the ability to prioritise work, meet deadlines and complete follow up work in a timely manner
5. Experienced at working with vulnerable people with an understanding of the issues involved in interviewing clients
6. Ability to empathise with the client group and respect different views
7. Understanding why confidentiality is important
8. A commitment and understanding of equal opportunities and sustainable development
9. Ability to monitor and maintain own standards and to seek supervision and guidance where necessary
10. Demonstrate an understanding of social trends and their implications for participants and service provision
11. Flexible approach to work and willingness to work as part of a team
12. Numerate to the level required in the tasks and understand the basics of money management and of the skills and confidence required to manage money effectively
13. Knowledge of the welfare benefits system
14. Effective writing skills with particular emphasis on recording case notes and form completion
15. Ordered approach to work and ability and willingness to follow procedures
16. Ability to compile and submit reports
17. Ability to use IT in the provision of advice, case recording and preparation of reports and submissions

18. Flexibility about travelling to locations most accessible to the programme participants with the ability to work within the catchment area
19. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively
20. A positive approach to self-development and assessment

### **Notes on Special Conditions of Service**

1. Valid and up to date driving licence and business insurance together with access to a car is essential as regular driving is necessary to carry out this role. Expenses will be paid in accordance to CASW's policies.
2. Enhanced DBS required
3. The post holders will be required to work across designated areas of Warwick District.
4. Some occasional evening and weekend work will be required together with a flexible approach where necessary.

### **The closing date for applications**

Monday 7th June 2021 9am.

Interviews will be held via video conference w/c: Monday 14th June 2021

**We look forward to receiving your application.**

### **Terms and conditions**

- If inexperienced at Citizens Advice we provide the essential citizens advice adviser training.
- There is a 6 months probation period for the role
- We work on a 37 hour working week, if you're part time then your holiday, sick pay and bank holiday days will be pro rata

## What we give our staff

- Holiday: 5 weeks holiday with 8 days bank holiday (pro rata if part time)  
With a mandatory time off between christmas and new year.
- Sick pay: 1 week full pay and 1 week half pay when starting, increasing to 1 month full pay and 1 month half pay after two years of service.
- Mileage (if you do home visits or outreach) and expenses reimbursed in accordance to our expenses policy
- IT equipment for your role provided
- Further training and CPD
- "People's Pension" Pension scheme
- Maternity / Paternity / Shared parenting pay