



# Money Advice Services Manager

## 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.

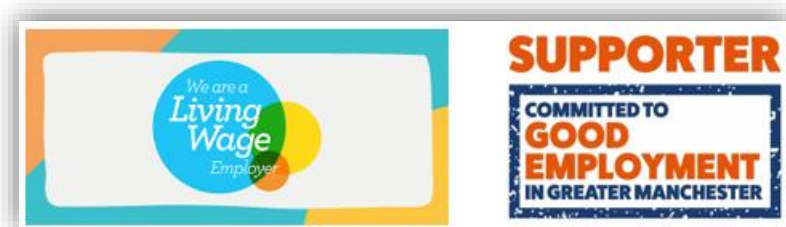
## Citizens Advice Bury & Bolton (CABB) – About Us

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."



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





## 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 Services Manager** vacancy.

## **The Application Process**

### Stage 1

To apply, please submit your CV & a covering letter to [jobs@cabb.org.uk](mailto: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 in addressing the 5 primary responsibilities of the role, 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

<b>Closing date</b>	Monday 19 <sup>th</sup> August 2024 at 10am
<b>Assessment</b>	Assessment for those who have been shortlisted will be required to progress to interview details will be provided
<b>Interview date – Post assessment</b>	Tuesday 10 <sup>th</sup> September 2024

### **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](mailto: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

<b>Job title</b>	Money Advice Services Manager
<b>Reporting to</b>	Deputy CEO (Head of Advice)
<b>Salary</b>	£ 30,095 - £34,373
<b>Contract</b>	Permanent
<b>Hours</b>	Full time (35 hours per week). The post-holder is expected to work flexibly, with advance notice, there may be evening and weekend work.
<b>Location</b>	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

As a member of the Leadership Team, the Money Advice Services Manager will have the following primary responsibilities:

- 1) Ensure that the Money Advice and Energy team, are effectively managed, consistently delivered and developed to achieve funder requirements, agreed KPIs, accreditation and contractual obligations, client outcomes and regulatory requirements.
- 2) Ensure that clients and the charitable objectives remain at the heart of the service.
- 3) Ensure delivery of high-quality advice services across money advice and energy, maximising engagement and access.
- 4) Work alongside other members of the leadership team to offer a smooth client journey.
- 5) Work with external partners, including local authorities, other VCFE and charity organisations and partners to develop working relationships to support the team.

## Role Profile

Key accountabilities & responsibilities	Key elements & tasks
Advice Delivery & Management	Hold responsibility for ensuring that the money advice and energy teams are best able to meet local need, is effectively managed, consistently delivered and developed to achieve funder requirements, agreed KPIs, accreditation and contractual obligations, client outcomes and regulatory requirements.
	Represent and liaise with funders & contract managers.
	Ensure opportunities to maximise client engagement and conversions from one-off advice to casework are utilised
	Support our research and campaigns work through various channels including case studies, data collection and client consent
	Monitor and review consistency of practice and provision, and initiate service improvement and development programmes to ensure that service delivery standards are met such as supervision, case recording, follow-up work and good quality of advice is delivered.
Planning & Development	Maintain an awareness of the operating environment, such as legislative developments, social trends and local needs, likely to affect demand for advice and opportunities for service development.
	Lead on money advice and energy delivery including quality audit processes to ensure services develop and evolve in accordance with performance data, stakeholder feedback and lessons learned.
	Translate organisational objectives into team and individual work plans, with clear and realistic targets.
	Participate in Citizens Advice, and other regional initiatives, as appropriate and contribute to the work of national and regional committees and working groups.



Service development	To assist with the development of the service locally, regionally and nationally, publicising work as and when necessary
	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 direct line management, support and expertise to the Money Advice team including on energy work.
	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	Ensure the money advice team and energy team’s accreditation/ training requirements are reviewed/ met including obtaining CPD, as required.
	To identify your own training needs in conjunction with the designated line manager and be prepared to undertake appropriate training in line with a learning and development plan and the needs of CABB
	Deliver training (internally and/or externally), either through formal training sessions, or ‘on the job’ coaching to colleagues
	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
Stakeholder Relations & Impact Reporting	Develop and maintain effective stakeholder relationships locally, regionally and nationally, ensuring the organisation has a high profile at all times.
	Attend & actively participate in meetings with the leadership team as required.

Personal Development	Ensure proactive development through reading, training and consultancy that your own level of knowledge of sector developments is up to date.
	Identify own training needs in conjunction with line manager and be prepared to undertake appropriate training in line with a learning and development plan and the needs of the organisation.
Other Duties and Responsibilities	Present a professional appearance and act at all times to uphold the good reputation of Citizens Advice.
	Effectively use systems in place to manage emails, calendars, chat platforms and any other required systems and services.
	Maintain confidentiality at all times, in line with statutory requirements and comply with all organisational policies and procedures.
	Liaise, as appropriate, with relevant outside agencies (voluntary and statutory), other Local Citizens Advice offices and other stakeholders
	Work flexibly to undertake such other reasonable duties and responsibilities.
<p>Please note that the above role 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)

<b>Experience</b> (through paid or voluntary work)
Minimum 2 years experience of delivering Money Advice in a social welfare context
Delivery of Energy advice in a social welfare context (desirable)
Experience of engaging with clients across a range of channels

Experience of flexible working, according to business need, while balancing multiple priorities and managing a high workload
Minimum 1 year experience of project management, across multiple income streams and locations (desirable)
Proven experience of planning and development of services and undertaking performance reviews to inform service improvement plans
Experience of people management and setting clear objectives
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
<b>Qualifications, Knowledge and Understanding</b>
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
Understanding of public and legal services administration, including commissioning
Demonstrable understanding and awareness of the relationship between Money Advice, Energy and other areas of Social Welfare Law
Demonstrable understanding of the emphasis on quality of advice
Demonstrable understanding of our 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
A commitment to continuous professional development (CPD), including a willingness to develop knowledge and skills in required areas
Relevant CertMAP Money advice qualification or the ability to work towards this
<b>Skills and Abilities</b>
Ability to interpret regulations and explain them to clients and colleagues and to produce clear advice and empowerment
Demonstrable ability to lead by example, fostering a positive and supportive work environment
Strong problem-solving skills with a focus on continuous improvement

Excellent organisational and time management skills, with the ability to prioritise effectively in a fast-paced environment
Proven ability to communicate effectively in person and in writing with a range of stakeholders, and to research, analyse and interpret complex information producing clear verbal and written reports
Ability to contribute to senior leadership and strategic planning, including the ability to identify and develop ideas and opportunities, delegate effectively, handle pressure and take day-to-day decisions
Skilled in influencing external change, with the ability to work with a variety of stakeholders, to earn and maintain the trust and respect
Ability to commit to, and work within, the aims, principles and policies of the Citizens Advice service and the ability to apply these to service delivery
Willingness and ability to commit to a rota within the required service delivery hours
<b>Additional Factors</b>
Ability to oversee services across multiple sites and to travel to those sites on a regular basis.
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
Understanding of, and commitment to, the aims and principles of the Citizens Advice service in which equality and diversity is embedded throughout
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.