

**Financial Capability Coach**

Job pack

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| **Want to chat about this role?**  If you want to chat about the role further, you can contact [jobs@arunchichestercab.org.uk](mailto:jobs@arunchichestercab.org.uk) |

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| **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. |
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 **The purpose of the role**

Arun & Chichester Citizens Advice are pleased to have received funding to support people to improve their budgeting skills.

You’ll be using session plans and adapting them to meet the needs of your client based on their goals. Topics may include creating a budget plan, working out how employment could impact benefit entitlement and much more.

Sessions can be delivered remotely (telephone or video call) or in person. You’ll need to be confident in using IT and able to adapt your approach depending on your client’s needs. You’ll need to demonstrate a non-judgemental approach.

The key aim of the project is to work with marginalised economically inactive people, such as disabled people, carers, refugees and survivors of domestic abuse, to create a sustainable household budget improve in Arun.

 **Role profile**

**Key Duties/Accountabilities**

1. Empowering clients to understand money management
2. Tailor session plans to client needs.
3. Act impartially when presenting options.
4. Be able to present to small groups as well as work with clients 1-to-1.
5. Keep accurate records of progress, where appropriate.
6. Highlight issues in a professional manner.
7. Communicate well with clients and other team members.
8. Work well with volunteers.
9. Confidence in demonstrating activities online.
10. Able to problem solve independently.

**TRAINING**

1. Keep informed of new and changing guidance.
2. Keep up to date with all the regular Citizens Advice circulars and information items.
3. Attend regular training to develop knowledge, skills and expertise.
4. Participate constructively in team meetings.

**ADMINISTRATION**

1. Ensure that the information sources in use are up to date.
2. Maintain statistics and analysis of work in accordance with ACCA procedures and funding conditions.
3. Be responsible for own file management and implement administrative procedures as directed by Line Manager.
4. Record outcomes on the database throughout the case management process.
5. Contribute to reports for Line Manager giving update of project, including all financial outcomes and a sample of case studies.

**POLICIES OF CITIZENS ADVICE**

1. The post holder must understand and be committed to the aims, principles and policies of Citizens Advice and the ACCA service.
2. The post holder must have due regard in the planning and execution of their duties and at all times to the aims, principles and policies of ACCA and Citizens Advice.

**Person specification**



1. Ability to plan and deliver financial capability coaching sessions.
2. Ability to use systems to collect, collate and share information about project achievements and outcomes.
3. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equal opportunities policies.
4. Good knowledge of money-saving techniques online and why there is a need to go online.
5. Knowledge and understanding of the barriers people with limited numeracy skills may face.

**What we give our staff**

* Workplace pension available
* Employee Assistance Programme
* Commitment to continued professional development
* Supportive and flexible employer
* An opportunity to work within a team that is friendly, forward thinking and passionate about helping our community