



Thank you for your interest in working at Citizens Advice Mid Mercia. The following information should give you all that you need to apply for this role.

Job Title;	Financial Inclusion Programme Lead
Salary;	£34,177
Hours of work;	37.5 hours per week
Responsible to;	Service Manager - Citizens Advice Mid Mercia
Location;	Remote working <ul style="list-style-type: none">• Role may involve work/travel across Midlands, East, South East of England.• Expectation to attend an office (Derby City / Church Gresley) every ¼ for service development / feedback and team building
Start Date;	1 st April 2024

The Service Aim

Orbit, being the UK's largest developer of affordable housing, believes that everyone is entitled to a good quality, safe and affordable home and currently manage 46,500 affordable and social rent homes across the Midlands, South and East of the UK. They support over 100,000 customers in differing stages of life, from those seeking their first home to customers looking for enhanced supported living.

For over 50 years they have been a force for positive change; leading in building thriving communities and believing that everyone is entitled to a good quality home that they can afford, in a place that they are proud to live.

Their Better Days programme helps thousands of Orbit customers every year through managing their money, trying something new, finding happiness with work or improving their digital skills and overall wellbeing.

They aim to :

- Provide good quality and energy efficient homes keeping running costs to a minimum
- Ensure rent or service charge costs are fair and value for money
- Empower our customers to be in control of their finances and wellbeing
- Ensure customers have the skills to maintain and sustain their income and expenditure.

Working closely in partnership with Orbit, we aim to deliver a financial inclusion service for 2 years, exclusively to Orbit residents as part of their Orbit's Better Days programme, providing **money advice, income maximisation** and **budgeting** advice across three regions of the midlands, east and south-east of England.

The service will be open to all Orbit customers:

CAMM – Financial Inclusion Programme – Orbit (Financial Inclusion Programme Lead)

- *Independent Living over 55s,*
- *customers housed with support,*
- *customers in rent arrears,*
- *customers via the community,*
- *shared owners.*

Customers will be able to access the service 5 days a week with multiple access points into the service irrespective of geography (phone / email / online / referral form) Face to face services, including home visits will be offered for customers with additional support needs.

The Role

We are currently seeking a dynamic and experienced Financial Inclusion Lead for our Financial Inclusion Programme, responsible for leading a team of Money Advice Caseworkers and Caseworker Assistants to ensure the delivery of a high-quality, target driven financial inclusion advice service, exclusively to Orbit customers.

Service Delivery

- ✓ Monitoring demand and managing resources
- ✓ Escalation contact for queries/ complaints / safeguarding issues
- ✓ Providing appropriate support / supervision for staff development and casework
- ✓ Monitor quality and provide appropriate feedback to staff
- ✓ Ensure all contractual targets are met and any risks are identified and mitigated against
- ✓ Encourage good teamwork and communication
- ✓ Support compliance with relevant policies and procedures
- ✓ Be part of CAMM's Operational team
- ✓ Work in partnership with Orbit staff for effective and efficient referrals and service delivery.

Quality

- ✓ Ensure any issues/trends around quality are addressed
- ✓ Ensure compliance with Citizens Advice Quality Standards
- ✓ Be the main point of contact for Orbit

Staff Management

- ✓ Formally line manage 6 Money Advice Caseworkers and 2 Caseworker Assistants
- ✓ To undertake regular staff meetings in line with the organisation's quality expectations
- ✓ To undertake performance and quality reviews with all staff
- ✓ To performance manage staff as per sickness, capability and disciplinary policies and procedures
- ✓ Create a positive working environment in which equality and diversity are well-managed, dignity at work is upheld and staff can do their best
- ✓ Encourage good teamwork and lines of communication between all staff
- ✓ Ensure the service is always staffed to achieve the expected standards / targets (expectation of supporting 9 customers per day)

Administration

- ✓ Working with the Caseworker Assistants, ensure reports required internally and externally are completed to expected standards
- ✓ Completing all HR for the staff
- ✓ To be responsible for developing and maintaining information systems
- ✓ To co-ordinate reporting of KPI's / Outcomes share key information with Development Manager

Undertaking Limited Advice and Casework

- ✓ Advising on maximising income and minimising expenditure
- ✓ Preparing financial statements

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- ✓ Administer cases and provide information, advice and casework as required.
- ✓ Keep accurate case records and orderly and secure case files.

Other duties and responsibilities

- ✓ Carry out any other tasks which may be within the scope of the post to ensure the effective delivery and development of the service.
- ✓ Undertake accredited training to be able to deliver advice and casework on all debt options, welfare benefits.
- ✓ Keep up to date with legislation, case law, policies and procedures relating to financial inclusion and attend appropriate training; including reading relevant publications
- ✓ Comply with all the organisation's published policies and procedures; Health and Safety, Confidentiality, and Equal Opportunities.
- ✓ Comply with organisational, statutory and legislative requirements
- ✓ Create self-help, interactive, accessible guides for Orbit customers
- ✓ Maintain regular contact with voluntary and statutory agencies.
- ✓ Promote the aims, principles and membership requirements of the CAMM Services

PERSON SPECIFICATION – Money Advice Caseworker

Essential

- The ability to commit to, and work within, the aims, principles and policies of Citizens Advice Mid Mercia;
- Ability to communicate effectively verbally and in writing;
- Ability to analyse and interpret complex information and produce and present clear reports verbally and in writing;
- Ability to lead and contribute to a team, including the ability to prioritise own work and the work of others, and take decisions in the day to day running of a busy service area;
- Experience of successfully delivering projects in line with specified quality standards;
- Experience of working in a high-pressured environment and meeting targets;
- Proven ability to work remotely; whilst supporting staff and attending office locations every ¼ as a minimum
- Previous experience of delivering advice under the Citizens Advice quality framework (generalist adviser) and hold the Citizens Advice's nationally recognised Adviser Learning Programme certificate.
- Previous experience of delivering / supervising debt advice (specialist)

Desirable

- Community Money Advice – Casework/Specialist Debt Advice Training (Level 4 Award)

Overview of Citizens Advice Mid Mercia Citizens

Citizens Advice Mid Mercia is an independent member of the Citizens Advice network, which is made up of the national charity and a network of local Citizens Advice members.

Citizens Advice Mid Mercia delivers free, impartial, independent and confidential advice, training, peer support and advocacy services. Services are delivered across South Derbyshire, Derby City, East Staffordshire (Burton-upon-Trent and Uttoxeter) and Tamworth.

Citizens Advice Mid Mercia has over 78 members of staff and many volunteers delivering services from four main offices and community venues.

Our CORE values.

- ✓ **Communicate:** We will be consistent, positive, passionate, and listen.
- ✓ **Ownership:** We will be accountable, make a difference, meet deadlines, keep promises and have solutions.
- ✓ **Respect:** We will be honest, work with integrity, trust each other, be fair, tolerant and stand for equality.
- ✓ **Effective:** We will deliver quality, focus on detail and be professional.

Probation Period: 9 months – with possible extension if performance review is required.

Benefits: 28 days annual leave plus bank holidays pro rata. Up to 5% pension contribution, access to 24/7 counselling service, full accredited training provided.

Positive Employment: We welcome applications from people with disabilities and a variety of backgrounds. In accordance with Citizens Advice national policy, the successful candidate will be screened by the DBS.

Want to chat about this role? If you want to chat about the role further, you can contact:

CAMM – Financial Inclusion Programme – Orbit (Financial Inclusion Programme Lead)

- Elizabeth Holt (Development Manager) 07841 918993
- Sarah Brown (Chief Operating Officer) 07815 741822

To apply: application form. Visit our website for details -

<https://www.citizensadvicemidmercia.org.uk/vacancies/#apply>