



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.

<b>Job Title:</b>	Financial Inclusion Administrator
<b>Salary:</b>	<b>£23,400 – £24,822</b>
<b>Hours of work:</b>	37.5 hours per week
<b>Responsible to:</b>	Financial Support Lead - Citizens Advice Mid Mercia
<b>Location:</b>	Predominantly based at Derby and Church Gresley offices with the possibility of remote working as required.
<b>Start Date:</b>	When suitable applicant found.

### **The Role**

We are currently seeking **2** experienced **Financial Inclusion Administrators** for our Financial Inclusion and Money Advice Services. As a Financial Inclusion administrator you'll support the Money Advice caseworkers to provide excellent services to clients, by completing administrative tasks throughout the client journey.

Main tasks of the role will include:

#### **Administration**

- ✓ Provide administrative support to all Money Advice Caseworkers and the Financial Support Lead
- ✓ Ability to prioritise own work, meet deadlines and manage workload in a busy environment.
- ✓ Ability to use IT systems and packages, and electronic resources in the provision of debt/benefit advice
- ✓ Preparation of reports/letters/submissions from systems such as Casebook, 365 & Microsoft Office
- ✓ Ability to monitor and maintain and multiple number of recording systems and procedures.
- ✓ Arranges meetings by scheduling appropriate meeting times, booking rooms, and planning refreshments
- ✓ Manages correspondence coming into the service via various sources
- ✓ Draft, formats, and prints relevant documents
- ✓ Managing and actioning inward referrals (email / phone/online/referral form)
- ✓ Undertaking debt assessments with clients
- ✓ Arranging appointments and updating calendars
- ✓ Facilitating onward referrals to internal or external services
- ✓ Co-ordinate room bookings– liaising with different agencies / organisations/ partners

## **Other duties and responsibilities**

- ✓ Any other relevant administrative and support duties required to ensure the smooth running of the organisation.
- ✓ Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- ✓ Ensure that work undertaken reflects and supports the Citizens Advice services equality and diversity strategy.
- ✓ Maintain confidentiality at all times
- ✓ Promote the aims, principles and membership requirements of the CAMM Services

## **Professional development**

- ✓ Attend meetings as required by line manager
- ✓ Complete relevant training according to the needs of the business and role

## **PERSON SPECIFICATION – Financial Inclusion Administrator**

### **Essential**

- Ability to provide administrative support to a large team – remotely at times.
- Ability to commit to and work within the aims, principles and policies of the Citizens Advice service.
- A good, up to date understanding of equality and diversity
- Ability to plan and organise own work to meet deadlines under pressure.
- Ability to work on own initiative and as part of a team.
- Good verbal communication skills, including the ability to deal appropriately with a range of people both face-to-face, telephone and electronically.
- Ability to write clearly and accurately, including drafting routine correspondence, and taking notes of meetings.
- Ability to use, update and maintain IT packages, including word processing / spreadsheet / database packages and the ability to use email and to maintain an electronic diary.
- Ability to research, analyse and interpret information.
- Proven ability of producing reports with large amounts of data from different sources

### **Overview of Citizens Advice Mid Mercia 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.

**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:

- Emma Herron **Financial Support Lead** 07889087514
- Email [staff@citizensadvicemidmercia.org.uk](mailto:staff@citizensadvicemidmercia.org.uk)

Visit our website (<https://www.citizensadvicemidmercia.org.uk/vacancies/#apply> ) to apply