



# Financial Capability Development Officer

## Job Pack

Thanks for your interest in working at Citizens Advice Bucks. 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:

- Overview of Citizens Advice Bucks
- The role profile and personal 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 Thalia by contacting [Thalia.jervis@cabucks.org.uk](mailto:Thalia.jervis@cabucks.org.uk)

## About Citizens Advice Bucks:

As of April 2021, Citizens Advice Chiltern, Aylesbury Vale and High Wycombe came together to form Citizens Advice Bucks, an independent and volunteer-based charity which provides a free and accessible advice and information service to clients across Buckinghamshire.

We can all face problems that seem complicated or intimidating. At Citizens Advice Bucks we believe no one should have to face these problems without good quality, free, independent advice. That's why we're here: to give people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.

You will be joining a supportive team of over 50 staff and around 80 volunteers all determined to do our best for our clients. Our core values are that we are client-centred, friendly, kind, professional and that we respect our clients, ourselves and each other.

Citizens Advice Bucks is an equal opportunities employer. We actively celebrate diversity, promote equality and challenge discrimination. We encourage and welcome applications from suitably skilled candidates from all backgrounds.

## **The role**

Citizens Advice Bucks has National Lottery funding for our Money Matters project to delivering free financial capability training across the whole of Buckinghamshire until 31 August 2023.

Money Matters is an exciting project which enables us to help people with the basics of money that are never taught. If we had a £1 for every time we heard from clients that they wished they taught money skills in school, our charity would be fully funded every year. This project helps stop people falling into poverty – and is a flagship of the preventative work that Citizens Advice can do. It involves reaching out to diverse communities and groups – we want to help as many people as possible manage their finances effectively. Your help could change lives.

## **Role profile**

### **Key work areas and tasks**

1. Develop and deliver tailored financial capability training using a variety of methods and approaches, including face to face (group and one to one), virtual, social media, video and developing learner courses online. Playing

an active role in promoting these with partner agencies, working closely with our communications team as well as proactive outreach to engage learners and help them overcome barriers to learning.

2. Develop resource in other areas which support financial capability and financial inclusion – including advice videos, social media collateral and other information working with our Communications Team
3. Work with stakeholders and community groups across the county to promote our learning offer and arrange and deliver learning and outreach sessions for individuals and groups targeting those with most need.
4. Take a responsibility for developing widespread publicity to encourage learner take up on the courses.
5. Define and manage the overall delivery plan for the project tracking progress and capturing data and information and reporting internally as well as compiling reports required for the National Lottery.
6. Ensure collection of quality feedback on learner outcomes and use these and other inputs to continuously improve delivery.
7. Develop and manage all learning resources for the project based on best practice
8. Organise all activities including venue bookings, equipment, refreshments.
9. Keep up to date with all Financial Capability developments and legislative changes affecting the topic area to support development of collateral.
10. Uphold all aims and principles of Citizens Advice, including its equality and diversity and data protection policies.
11. Carry out all other appropriate tasks as required by Line Manger and Citizens Advice Bucks.



## Person specification

### Essential Criteria

1. Excellent interpersonal skills, including the ability to sensitively empower and engage with adults who have had a poor experience of formal education.
2. Able to reach out to and engage with people from diverse communities and backgrounds
3. Able to creating and maintaining positive and productive relationships with all existing stakeholders. Ability and drive to create new relationships as required.
4. Understanding of theory and principles of adult learning and development.

5. Able to develop learning materials and activities and other collateral to be delivered through a variety of channels including video and social media.
6. Proven ability to successfully design and deliver project milestones and outcomes including data gathering and reporting.
7. A strong understanding and knowledge of personal financial issues that affect adults at risk of financial exclusion.
8. Ability and willingness to work both on own initiative and as part of a team.
9. Ability to use IT and online resources to research developments in financial capability; legislative changes relative to the subject; record statistics; produce project reports; create documents, learning materials and keep accurate project records.
10. Able to travel to venues across Bucks to deliver training face to face training and engagement

### **Desirable Criteria**

- Knowledge of the work and nature of Citizens Advice.
- Previous project management experience.
- Teaching / Training Qualification or experience of teaching and training.

In accordance with Citizens Advice national policy the successful candidate will be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.



## **Terms and conditions**

Role: Financial Capability Development Officer

Reporting to: Chief Executive, Citizens Advice Bucks

Salary: £27,000 FTE

Hours: 37 hours per week

Duration: Fixed Term Contract to 31 August 2023

Candidates must:

-  Hold a clean driving licence.

 Have use of their own car.

 Be able and willing to travel over the whole of Buckinghamshire.



## What we give our staff

Generous annual leave and pension contributions.  
Employee Assistance Programme.  
Flexible working /work from home and hybrid working.  
Family/homelife and worklife friendly policies.  
25 days annual leave per year + Bank holidays (33 days)

## How to apply

Please send your CV and a covering letter detailing your experience using the Person Specification to [admin@cabucks.org.uk](mailto:admin@cabucks.org.uk)