

# Energy & Money Adviser

## Job pack

Thanks for your interest in working at Citizens Advice Sandwell & Walsall. 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 Sandwell & Walsall.

### **Want to chat about this role?**

If you would like to chat about this role further, you can contact us at:  
[staffrecruitment@citizensadvice-sandwell-walsall.org](mailto:staffrecruitment@citizensadvice-sandwell-walsall.org)

### **How to apply?**

Please visit our [website](#) to download an application form.

# Our Aim, Vision & Values

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

## Our Aim

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives

## Our Vision

We will enable individuals and families in need by providing quality advice and advocacy. We constantly expand our partnerships and stakeholder network to strengthen our ability to influence policy and command change for the good of the community. We have highly trained professional teams that have the knowledge and skills to make the biggest positive impact.

## Our Values

- We make a positive difference to the community
- We develop the knowledge of our people and are a learning organisation
- We celebrate individual and collective achievements that we can build on
- We embrace diversity and stand up for equality

# Overview of Citizens Advice

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.

**2. We're here for everyone.** Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

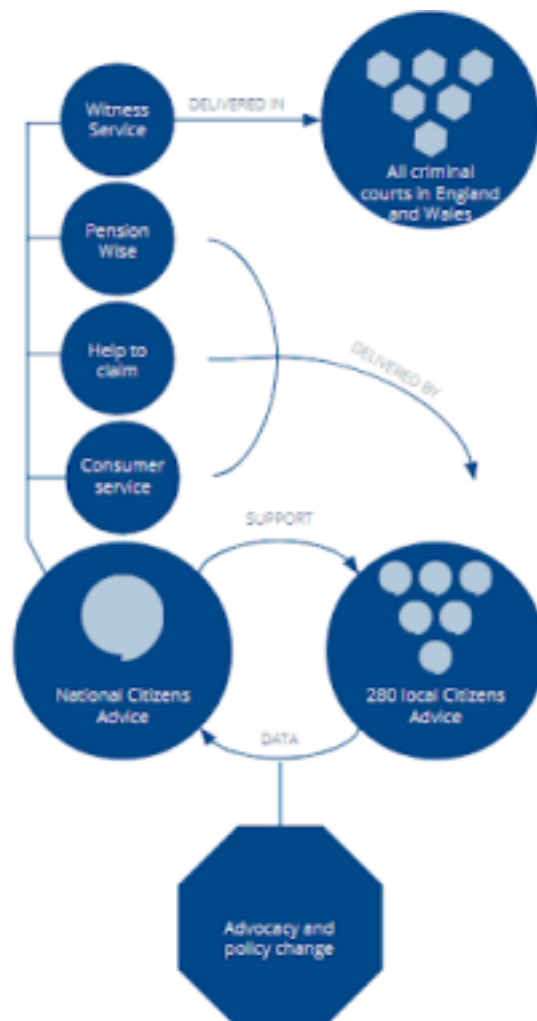
**3. We're listened to - and we make a difference.** Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

We have a network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.



# The role

**Hours:** 37 hours per week x 3 FTE

**Salary:** £26,545.50

**Contract:** Permanent and Fixed Term available - Fixed term with an option of permanency if funding gets confirmed

**Location:** Sandwell & Walsall

**Closing date:** 4th May 2026 @11:59pm

**Interviews:** 11th May 2026

## Job Purpose:

- A) To support members of our local community who are in or facing fuel poverty as a result of the current cost of living crisis.
- B) Using a casework approach you will offer budgeting advice, information around understanding energy bills, benefit calculations, support with grant applications and to work closely with other teams within the organisation/local partnerships in order to provide clients with detailed and holistic advice.
- C) The role requires you to have a level 3 in energy awareness
- D) If you do not have this already, we will support successful candidates to complete this qualification prior to advising within 3 Months of course commencement date.

## Key Responsibilities:

### Financial Inclusion

- To deliver financial capability advice in an interesting and engaging manner; covering energy use, money management skills such as budgeting, maximising income through benefit checks, money saving tips and grant applications
- Work with clients to develop positive habits and attitudes to energy use, as well as working to improve money confidence and build self resilience
- Research and explore options and implications so clients can make good informed decisions and priorities

### Casebook Management and Administration

- To make accurate records of sessions and clients seen, using approved case recording systems and other monitoring systems required by funders.
- Maintain consistent high quality scores for client advice and administration
- Manage own case load ensuring case notes are written up within the specified timeframes

**Stakeholder Engagement**

- Negotiate with third parties such as statutory and non statutory bodies.
- To network and attend promotional events, raising awareness of our services and building good relations with other local providers
- Build and promote good internal/external partnership links to encourage referrals into the service and signposting of clients to more specialist services.

**Research and Campaigns**

- To identify research and campaign issues arising from work with clients.
- To assist with research and campaigns work by providing information about clients' circumstances through the appropriate channel.

**Professional Development**

- To keep up to date with current/new legislation, case law, policies and procedures and attend appropriate meetings.
- To read relevant publications
- To be responsible for identifying own training needs and attend courses as agreed with the Line Manager
- To attend relevant internal and external meetings as agreed with the line manager
- To prepare for and attend supervision sessions
- To assist in initiatives to improve service

Other such duties may be required from time to time due to business needs, which are consistent with the Job Purpose.

# Person specification

| Essential                                                                                                                                                                                                                                                                                                                                                 | Method of assessment |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| <b>1. Financial Capability</b><br>A) Have 1 Years experience of supporting and guiding those who are vulnerable and struggling financially, demonstrating how clients can be empowered to move forward to be more financially secure.<br>B) Hold or be prepared to undertake Level 3 Energy Awareness qualification within the first 3 months of the role | A/I                  |
| <b>2. Case Work and Administration</b><br>A) Demonstrate ability to produce high quality clear and concise casenotes, and administrative tasks, with the ability to manage a caseload.<br>B) Quality of Cases to meet at least 90% as per Quality Process                                                                                                 | A/I                  |
| <b>3. Communication and Interpersonal Skills</b><br>A) Excellent oral and written communication skills, with the ability to engage effectively with people at all levels, produce accurate records, and convey information clearly and sensitively.                                                                                                       | A/I                  |
| <b>4. Digital Competence and IT Skills</b><br>A) Confident in using IT across a range of platforms, including digital tools, websites, and completing reporting spreadsheets to track progress and KPI's                                                                                                                                                  | A/I                  |
| <b>5. Teamwork and Partnership Working</b><br>A) Proven ability to work collaboratively as part of a team, build partnerships with external stakeholders, and contribute positively to shared objectives.                                                                                                                                                 | A/I                  |
| <b>6. Organisational and Self-Management Skills</b><br>A) Ability to prioritise tasks, meet deadlines, monitor own                                                                                                                                                                                                                                        | A/I                  |

|                                                                                                                                                                                     |     |
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| performance against targets, and work effectively on own initiative with a positive attitude to continuous professional development.                                                |     |
| <b>7. Practical Requirements and Flexibility</b><br>A) Willingness and ability to travel across the Sandwell & Walsall base and undertake occasional out-of-hours support sessions. | A/I |

## What we give our colleagues

We value all our colleagues and offer a **supportive culture** within a charity setting that is committed to social justice. All of our roles attract a rewarding remuneration package with excellent terms including:

- **Generous Holiday Allowance** – Enjoy **26 days** of annual leave, plus bank holidays. Your entitlement increases to **31 days** after 5 years of service and **33 days** after 10 years
- Secure your future with our competitive **pension scheme**
- **Volunteering Day** – Take one fully paid day per year to support a cause you're passionate about
- All paid staff are eligible to apply for a **Blue Light Card** giving you access to amazing discounts on shopping, dining, travel, entertainment, and more. Helping you save on everyday essentials and special treats
- We conduct **annual pay reviews** to ensure fair and competitive pay
- **Health & Wellbeing Support** – Access to an Employee Assistance Programme (EAP)
- Training programs, funding for **professional qualifications**, or personal development opportunities
- We offer a number of **inclusive policies** designed to cater to the diverse needs of our colleagues. Some of the policies we offer include:

- **Carers' Policy** – Unpaid carers will be entitled to paid leave entitlement of up to 3 working days and 5 days unpaid leave every 12 months
- **Menopause Policy** – Providing guidance and support for those experiencing menopause, ensuring a comfortable and respectful work environment
- **Trans Inclusion Policy** – Committing to an inclusive workplace for all gender identities, with clear support and resources for trans employees

Applicants must have the right to work in the UK. Proof of eligibility will be required before employment begins.

## How to apply?

Please complete the application form, highlighting your suitability for the role by addressing the essential criteria outlined in the person specification. Please send your completed application to: [staffrecruitment@citizensadviceandwell-walsall.org](mailto:staffrecruitment@citizensadviceandwell-walsall.org) by the closing date.

If you require any adjustments or support to help you with your application, please email [staffrecruitment@citizensadviceandwell-walsall.org](mailto:staffrecruitment@citizensadviceandwell-walsall.org)

Wishing you all the best with your application!