



Financial Wellbeing Caseworker

Job pack

Thanks for your interest in working at Citizens Advice Bournemouth Christchurch & Poole. 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:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice BCP
- 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 Jamie White by emailing jamie.white@citizensadvicebcp.org.uk

How to apply

Please complete the application form attached to the advert and email it to recruitment@citizensadvicebcp.org.uk by the closing date below. If you need this pack in another format, or any adjustments to apply or attend an interview, please let us know.

Closing date for applications: 9am on Friday 6th November 2026

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.



3 things you should know about Citizens Advice

1. We're local and we're national. We offer direct support to people in around 250 independent local Citizens Advice services across England and Wales. We're supported from 4 national offices

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.

How Citizens Advice Bournemouth Christchurch & Poole works

Every year thousands of people come to us for advice and help with solving their problems.

We're here for everyone and help with problems like managing debt or household bills and understanding rights at work or housing issues. We also provide specialist services in welfare, benefits and debt.

Our projects include Macmillan Cancer Support, Immigration, multiple specialist Benefits and Debt services.

We're an important part of this community, with 4 offices across Bournemouth, Christchurch and Poole, where people need us.

Through our daily interaction with clients, we have a credible understanding of local needs. We use our data and insight to tailor our services, as well as help improve policies and practices locally.

Putting our client's needs at the heart of decision-making means we also work in partnership, making it easier for clients to access relevant services.

We're also part of the Citizens Advice service. This means we share knowledge and best practice so that people can expect a quality service.

Together we work to fix the underlying causes of people's problems using evidence gathered from across our network. Because of this, we save society money.

Last year we helped people with over 41,500 issues through face-to-face, telephone and webchat.



The role

Context of Role

Citizens Advice Bournemouth Christchurch and Poole (CABCP) provides advice and information services to around 15,000 people every year with over 41,500 different issues. This is delivered through a dedicated team of paid staff and over 80+ trained volunteers. All volunteers receive comprehensive training and ongoing support before delivering advice services to the community.

Role Purpose

The Financial Wellbeing Caseworker will provide financial capability and wellbeing support that enables clients to manage their money effectively, maximise household income and build confidence in managing their finances, helping to prevent future financial difficulties.

The postholder will work with clients experiencing a range of financial challenges and support them to make informed financial decisions through budgeting, income maximisation and financial planning. Whilst the role is not required to provide regulated debt advice, it will involve identifying debt-related issues and signposting or referring clients to appropriate specialist services where required.



Role profile

Key Responsibilities

- Identify individuals who meet the eligibility criteria for the project and follow appropriate procedures for engaging with those clients.
- Provide casework covering the full range of financial capability and wellbeing support.
- Work with individuals to develop their knowledge, skills and confidence in managing their money effectively and making informed financial choices.

- Understand the triggers for financial difficulties and explore these with clients, signposting or referring to appropriate CABCP services and external support organisations where necessary.
- Advise clients on ways to maximise income through benefit entitlement checks, better-off calculations, grant applications, tax code checks and other income maximisation opportunities.
- Accurately identify income, assets, expenditure and liabilities and assist clients in preparing financial statements.
- Support clients to understand the difference between priority and non-priority expenditure, the importance of forward planning and effective money management.
- Manage a caseload of clients requiring ongoing financial wellbeing support and advice.
- Identify needs for and make referrals to internal and external services where appropriate.
- Use relevant IT and case management systems to record cases, activities and outcomes accurately in line with CABCP procedures.
- Work collaboratively with colleagues to maintain accurate client records and meet funder reporting requirements.
- Collect and maintain monitoring information, outcome data and client feedback required by funders and stakeholders.
- Contribute to project reports and evidence demonstrating service impact and outcomes.
- Develop effective working relationships with referral partners, community organisations and key stakeholders.
- Attend outreach sessions, partnership meetings, promotional events and networking opportunities as required.
- Recognise safeguarding concerns and follow CABCP safeguarding procedures when appropriate.
- Demonstrate commitment to equality, diversity and inclusion and ensure services are accessible to all clients.
- Apply Citizens Advice aims, principles and policies in all aspects of client work.
- Recognise own levels of competence and seek support from senior colleagues where required.
- Ensure all work meets the quality standards required by CABCP.
- Attend staff meetings, team meetings, supervision sessions and training as required.
- Abide by all health and safety policies and share responsibility for the safety of themselves, colleagues, volunteers and clients.
- Undertake any other duties within the scope of the role as reasonably required by the Team Leader or Management Team.

Professional Development

- Keep up to date with legislation, policies, procedures and best practice relating to financial capability, welfare benefits, income maximisation and financial wellbeing.
- Undertake training and continuous professional development relevant to the role.
- Read relevant publications and guidance materials.
- Attend internal and external meetings as agreed with the line manager.
- Prepare for and participate in supervision, appraisal and team meetings.
- Contribute to service development initiatives and continuous improvement activities



Person specification

1. Experience delivering financial capability, financial wellbeing, money guidance or income maximisation support.
2. Experience supporting vulnerable clients experiencing financial difficulties.
3. Knowledge of welfare benefits, budgeting and income maximisation opportunities.
4. Ability to prepare financial statements and support clients with financial planning.
5. Excellent verbal communication skills, including the ability to build rapport and explain complex information clearly.
6. Strong written communication skills, including record keeping and report writing.
7. Ability to manage a caseload effectively, prioritise work and meet deadlines.
8. Strong IT skills and experience maintaining accurate electronic records.
9. Ability to work effectively as part of a team and contribute positively to service development.
10. Ability to give and receive feedback constructively.
11. Understanding of social issues affecting individuals and communities and their impact on clients.
12. Commitment to the aims, principles and equality and diversity policies of Citizens Advice.
13. Experience working within Citizens Advice or a similar advice environment.
14. Knowledge of Casebook or equivalent case management systems.
15. Relevant qualification in Money Guidance, Financial Capability, Welfare Benefits or Advice Work.
16. Understanding of local support services across Bournemouth, Christchurch and Poole.

17. Experience delivering workshops, group sessions or community outreach activities.
18. Experience working within services funded through external grants or contracts.

In accordance with Citizens Advice national policy, we may ask the successful candidate to 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

Salary: Scale 5 to 7 - £24,573 to £25,148 per annum (dependent on experience)

Hours: Full Time – 37 hours per week

Contract: Fixed term for 1 year initially

Holidays: 25 days + Bank Holidays



What we give our staff

We offer ongoing training and support, generous annual leave, access to online health/wellbeing resources, Life leave policy, an Employee Assistance Programme and employers pension contributions.