Bank Workers Charity

Supporting the health and wellbeing of the banking community

Client Advisor
Applicant Information Pack

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Introduction

Thank you for the interest you have shown in the Bank Workers Charity (BWC).

In 2019 our organisation will be 136 years old and on a journey from the Bank Clerks’ Orphanage through the Bankers Benevolent Fund to the organisation we are today and we remain committed to supporting the banking community.

Our organisation was a first in the world of banking, and, unlike many other charities it was founded and financed by bank workers themselves rather than by one or more of the great and the good of the day. Today we remain the only UK charity supporting the entire banking community.

Those we serve are at the heart of everything we do and we will continue to invest in creating a wider range of information, advice and tailored support for our clients. Working with specialist partners makes it possible for us to deliver both prevention and transformational support to people who really need it.

Our success can only be achieved through the talents of the people who work in our team. BWC has, over the last five years, transitioned from a grant making charity to one which provides services and advice but we are only at the very beginnings of what the breadth of this multi-channel offer could and should be.

However, in order to remain successful and support more people each year with impactful outcomes we continually develop what we do, the channels we deliver through and the areas of service we can offer. We need great people to work with us to help us do this.

We believe that through focus, innovation, and working with the UK's leading support organisations and banks, we can transform the lives of the people we support. We are focused on making our vision of being a leading charity - providing high impact solutions that genuinely meet the needs of all of the banking community - a reality.

John Mallalieu
Chief Executive
Key Strategic Priorities 2019 - 2022

BWC exists to support the health and wellbeing of the banking community which numbers almost two million people.

We try to be the most customer centric organisation we can be, aiming to build a place where people can quickly find the resources they need to take action to support their long-term wellbeing.

The relationship between us and the banks is key to ensuring that current and former employees are able to access our support and that our services meet the specific needs of bank employees whilst ensuring client confidentiality.

Our key strategic priorities include:

- Continuing to drive awareness of our offer so that those we seek to serve are able to access us when they need us and in more convenient ways.

- We will support more people by widening the range of banks we work with and by extending our reach to building societies.

- Developing our operational model to ensure the services we offer and the support we commission will become easier to access at times and in ways more convenient to our clients.

- We will become ever more responsive to the changing needs of the banking community, offering a wider range of support that is relevant to the emerging needs and complements the support available from other sources.

- We will become known as the health and wellbeing expert within the banking sector and increasingly influential in banking organisation’s thinking about health and wellbeing.

- We will ensure all our staff are supported and enabled to deliver the outcomes we expect of them in delivering our Service Goals

- We will manage our financial resources in line with agreed investment objectives to deliver net income to support delivery of our Service Goals.
Our Values and Behaviours

BWC’s organisational values are Integrity, Caring, Respect, Fairness and Achievement.

Living these values applies to all employees as well as other BWC stakeholders including suppliers and partners. The values will be referenced in particular when recruiting new staff and in staff performance reviews. Detailed below is a set of behaviours which links with and reflects our values.

<table>
<thead>
<tr>
<th>Our values and what they mean</th>
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</thead>
<tbody>
<tr>
<td><strong>INTEGRITY</strong></td>
</tr>
<tr>
<td>Our clients sit at the heart of everything we do.</td>
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<tr>
<td>We are professional, accountable and follow through on our commitments.</td>
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<tr>
<td>We put the shared interests of the Charity ahead of those of any individual or team.</td>
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<tr>
<td>We are honest and ethical and build trust with our clients, partners and colleagues.</td>
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<tr>
<td>We are proud of our Charity and protect its good reputation.</td>
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<tr>
<td>We support our colleagues to have the courage to speak out against inappropriate behaviour.</td>
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<tr>
<td>We collaborate and communicate openly and honestly.</td>
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<tr>
<td>We are determined to do the right thing and are committed to delivering the right outcomes.</td>
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Job Description

Role Description

Client Advisor – Services & Grants Team

Responsible to: Team Leader

Responsible for: No direct reports

Key purpose:
To support the delivery of service by providing advice, guidance, and case management for a client portfolio, ensuring BWC provides solutions for people in need to help them achieve long-term sustainability, and manage the client journey through BWC services.

Principle Accountabilities:

Advice & Guidance - Helpline Support

- Act as first point of contact for new and existing clients from various channels, such as telephone, email or live chat, prioritising urgent and crisis cases when necessary.

- Conduct an assessment of need, providing advice and guidance on a range of general issues to people on low incomes, living with a disability, mental health, in financial hardship, long-term sickness and crisis situations.

- Prioritise clients’ needs, managing client expectations and managing a client’s journey through BWC’s services, taking ownership of a case workload.

- Sensitively manage and signpost clients towards alternative sources of support.

- Provide emotional support as well as practical support when clients present with complex issues, in order to develop a relationship built on openness and trust

- Assess and determine the need for case referral to the home visiting caseworkers

- Share insights with other client advisers and participate in de-briefing with the team, and with the Team Leader, voicing any concerns regarding the impact of the case upon you personally, particularly when handling distressing cases.

- Ensure clients are treated with dignity and respect taking account of an increasing need for equality and diversity in the way in which clients are managed and the types of services offered.

- Manage referrals and responses to third party / external organisation enquiries in relation to current and potential client applications, adhering to safeguarding, data protection (GDPR) regulations and client confidentiality.
Casework Management

- Conduct a review of applications for grants and services liaising with clients in order to fully understand and assess their needs against pre-determined criteria
- Write accurate, detailed and objective reports on behalf of clients, making appropriate recommendations for a grant or service, in order for it to be presented for approval
- Ensure targets are met and client caseload is managed in a timely manner.
- Manage partner referrals and follow up with clients
- Ensure income maximisation through the take up of appropriate benefits and effective budgeting advice.
- Ensure that all casework management conforms to Quality Standards, the service adopts.
- Keep accurate and timely records ensuring high quality data is input on the CRM system for each client for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
- Ensure that all casework conforms to our systems, policies and procedures

Administration

- Contribute information and assist with the weekly grant payment run
- Keep up to date with policies and procedures relevant to the role and undertake appropriate training

Role Dimensions:
No people responsibility
No budget responsibility

Contextual Information:
This role is full time

BWC have assessed the post of Client Advisor as requiring an Enhanced level of disclosure. Any applicant who is offered employment will be subject to a Disclosure & Barring Service (DBS) check from the DBS before the appointment is confirmed.
### Person Specification

#### Qualifications & Training

**Method of Assessment:** Application & Certificate Check

<table>
<thead>
<tr>
<th>Essential requirement</th>
<th>Desirable requirement</th>
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</thead>
<tbody>
<tr>
<td>Not applicable</td>
<td>Degree level</td>
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</table>

#### Experience & Knowledge

**Method of Assessment:** Application & References

<table>
<thead>
<tr>
<th>Essential requirement</th>
<th>Desirable requirement</th>
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<tbody>
<tr>
<td>Experience of working in a casework service and handling enquiries from multiple channels such as telephone, email and live chat.</td>
<td>Experience of using Live chat.</td>
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<td>Experience of the welfare benefits system and the ability to provide benefit checks on behalf of clients.</td>
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<td>Significant experience of working with dealing with people who may be vulnerable, in distress or in crisis situations, acting with integrity and fairness while providing practical, long-term solutions.</td>
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<tr>
<td>Experience of providing generalist advice, support and guidance to clients in multiple areas such as welfare benefits, budgeting, housing, employment, care, debt and mental wellbeing.</td>
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<td>Experience of working with external organisations, including BWC partners - and managing client referrals and follow-up</td>
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<td>An understanding of safeguarding, confidentiality and data protection (GPDR) procedures.</td>
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### Skills & Abilities

**Method of Assessment:** Application, Interview & Tests, if applicable

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<thead>
<tr>
<th>Essential requirement</th>
<th>Desirable requirement</th>
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<tr>
<td>Ability to review and assess grant applications.</td>
<td>A proven knowledge of the charity sector, agencies and local authorities.</td>
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<td>Ability to collate information and use it to produce accurate, detailed and objective grant reports and letters.</td>
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<td>Experience of using databases and CRM systems such as Thankq or similar.</td>
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<td>Experience of working with clients to a high standard with excellent customer service skills.</td>
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<td>Ability to communicate effectively to a broad range of clients within the banking community.</td>
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<td>Excellent and accurate administration skills/ability to write clearly</td>
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### Personal Qualities / Competencies

**Method of Assessment:** Application, Interview, References & Tests, if applicable

<table>
<thead>
<tr>
<th>Essential requirement</th>
<th>Desirable requirement</th>
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<td>An understanding and appreciation of the complexities faced by clients.</td>
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<td>Ability to demonstrate empathy and good decision making skills alongside using initiative.</td>
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<td>Able to work calmly and productively under pressure and keep to deadlines.</td>
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<td>Strong team work ethic and happy to work in a small team.</td>
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<td>Adaptable to changing circumstances and receptive to new ideas, initiatives and a willingness to learn.</td>
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Terms and Conditions

- Salary Range: This post is evaluated at pay grade 3, £29,880 to £32,867
- Following probation we offer a discretionary performance related bonus of up to a maximum 15% of annual salary
- 28 days holiday plus statutory bank holidays
- 10% employer contribution to BWC’s pension scheme
- Group Life Cover (three times annual salary)
- Season Ticket loan (upon successful completion of probation)
- Employee Assistance Programme

Opportunities that we can offer you

- Work for a charity with big ambitions, a clear vision, leadership and the commitment and resources to deliver
- Make a real difference to people struggling in these challenging times
- Demonstrate your skills in charity delivery
- Join an enthusiastic team, supported by a board of trustees who back the vision
- An opportunity to exercise your knowledge, problem solving skills and judgement in a challenging role
- Receive a competitive total reward package

How to Apply

Please provide a supporting statement along with your CV. Your supporting statement should clearly set out how you meet the criteria set out in the Person Specification. You will need to provide evidence and give us examples and dimensions about what you achieved and how it helped meet your organisation’s goals.

Please send all of the above information by email to recruitment@bwcharity.org.uk

For more information on the Bank Workers Charity, please visit www.bwcharity.org.uk.