

Job  
and



Description  
Person

### Specification

## Trainee Benefits, Debt & Energy Adviser

### Fixed Term Contract to 31/03/2026

<b>Salary:</b>	£22,500 per annum	<b>Place of Work:</b>	Home Based - able to travel across North Devon
<b>Hours of Work:</b>	37 Hours per week	<b>Reporting to:</b>	Service Delivery Manager

### About Encompass Southwest

Encompass Southwest is an independent registered charity that provides a range of advice, information and support services in communities across the south west of England, with a strong focus on rural/rural remote settlements. Our work focuses on 3 main areas;

- Homelessness and Rough Sleeping for adults and young people
- Supported Housing
- Financial Inclusion (Money & Debt Advice)

### Changing Lives through Inclusion

Encompass Southwest has a formal partnership with Navigate Charity and Mind in Somerset known as “Wis£rmoney”. The partnership was formed in 2012. Wis£rmoney operates across Devon and Somerset providing services for people who are experiencing poverty, hardship and financial exclusion.

Our projects and partnerships are by funded by Charitable Grants and Donations to deliver financial inclusion and advice services across rural districts in Somerset and Devon. We aim to improve the lives and financial wellbeing of individuals and families and to strengthen the resilience of the individuals and communities we work with, build community cohesion and reduce social isolation.

We achieve our aims by **Valuing people**. Recognising the commitment and achievements of our staff and volunteers and investing in their training and support. Providing our staff with the tools and resources needed to fulfil their roles and personally develop.

***Working with the Wis£rmoney Partnership is extremely rewarding, knowing you are part of a team that can and does transform lives.***

### Our Funder

This is a project delivered by the Wis£rmoney partnership. The Project works in rural and remote rural towns and villages in Mid and North Devon for the prevention and relief of poverty, hardship and financial exclusion through the provision of specialist education and advice services to families and individuals with multiple and complex needs.

### Job Purpose

The Trainee Benefits, Debt & Energy Adviser will work closely with our most complex clients who are often in crisis and who face multiple barriers to obtaining the advice and support they require. Working with the financial inclusion team to provide predominately benefits and energy advice to clients

presenting with high level needs. Full training will be provided via an intensive 12 week training and coaching program.

#### **Key Work Roles**

1. Assess and review client's needs and their ability to successfully engage with advice
2. Independently and confidently understand the barriers that clients may face and creatively find ways to remove these including multi agency working and cross collaboration.
3. Provide comprehensive benefits and energy advice that is tailored to individual need using a mixture of delivery channels including home visits, telephone, email, video and letter
4. Update and maintain accurate case management records.

#### **Main Duties**

5. Working closely with key stakeholders, establish and deliver high quality, accessible benefits & energy advice services.
6. Provide clients with high quality, comprehensive advice, practical support and guidance that focuses on:
  - Assessing overall household income and working out further entitlement using benefits calculators where necessary
  - Maximising income through welfare benefits advice and uptake including appeals
  - Fuel poverty, energy efficiency issues and switching
  - Form filling including accessing grant awards
  - Referral and signposting
  - Summarising information with confirmation of advice letters
7. Using prescribed forms and documents, prepare action plans that reflect the identified needs of clients. This should be done in a sensitive and appropriate manner that respects each client's dignity and individuality.
8. Undertake on-going casework, including advocacy and representation on behalf of clients as appropriate.
9. Foster, co-ordinate and maintain close working relationships with external agencies and stakeholders, working in a cooperative and consultative manner and encouraging joint working to the benefit of both clients and WisErmoney.
10. Keep in touch with local issues and developments and changes in procedures within local and national agencies.
11. Work independently and provide peer to peer support to your colleagues, sharing good practice and skills.

#### **General Duties, Administration, Records and Statistics**

12. Record and maintain detailed and accurate case recordings using our online case management system, AdvicePro.
13. Accurately maintain all project records/reports/client records/client notes etc.
14. Remain up to date and proficient in the use of all relevant IT applications and undertake training as required.
15. Completion of a case study each quarter which should be anonymised in accordance with the WisErmoney policy.
16. Commit to professional development by attending training and courses as required, working towards specialist level.
17. Carry out any other duties commensurate with the post which may be reasonably requested from time to time.

## Person Specification

### Desirable

- Practical experience of delivering benefits advice in a paid or voluntary capacity.
- An understanding of the processes, procedures and ethics of the advice sector.
- A 'people person' able to build rapport with and be sensitive to the needs of the service user who are facing crisis and may have multiple and complex needs.
- Ability to work with and advise vulnerable service users in a way that promotes their rights, dignity and independence.
- An ability to communicate effectively orally and in writing.
- A non-judgmental approach
- A strong understanding of issues of confidentiality, GDPR, lone working, risk assessments, health and safety in the workplace
- A commitment to maintaining professional boundaries.
- Committed to training and personal development and keeping up to date with social policy as it relates to benefits and money advice.
- Be able to prioritise tasks and work to deadlines. Manage time effectively under own initiative.
- A full DBS check will be required.
- Be able to travel to appointments across the districts of Mid Devon and North Devon.
  
- Experience in a voluntary or paid capacity in some of the following service areas:
  - mental health
  - addiction
  - young people and care leavers
  - housing
  - advice
  - social prescribing
  - health