



# Bank Workers Charity

Supporting the health and wellbeing of the banking community

## Client Adviser – Services and Grants Team

### Applicant Information Pack

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## Introduction

Thank you for your interest in joining us at the Bank Workers Charity.

We're committed to transforming the wellbeing of the banking community - current and former bank workers, retirees and their families. We do this through financial support, advice and information through our staff and partners, and by working closely with the banks to promote the wellbeing of their staff.

This year we're 142 years old, and we're needed now more than ever. In 2022 we launched our new strategy to reflect the changing needs of the banking community. Our new strategy is one of growth and development whilst putting our commitment to equality, diversity and inclusion and those we support at the heart of what we do.

We continue to invest to grow the range and reach of our services, and over the last year we supported more clients than ever before. As well as our own dedicated team, we work with a number of specialist partners who make it possible for us to deliver both preventative and transformational support, to those who really need it.

Our daily conversations with clients help us to better understand and adapt to meet their needs. Our Client Adviser role is crucial to providing holistic support for our clients and helping them to get the support they need through our services and elsewhere.

Our success can only be achieved through the talent of the people who work in our team. We want to lead by example in supporting the wellbeing of our staff and have a generous package of support for staff and put wellbeing and resilience at the heart of how we support our team.

We believe that through focus, innovation and working with the UK's banks and key partners, 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. We need great people to work with us to help us do this.

**Jonathan Saverimuttu**

Chief Executive Officer

## Key strategic priorities 2022 – 2025

**Building the wellbeing of the banking community**

**Deepening our connection with the banking community**

**Equality, diversity and inclusion in everything we do**

**Strengthening our organisation**

**Building our financial sustainability**

### **Building the wellbeing of the banking community**

We will work alongside the community to coproduce our services, and will develop a culture of continuous improvement, optimisation and innovation to ensure we stay relevant and create the best value possible for our resources.

We will see year-on-year growth in the number of clients we support, increasing the difference we make to the lives of the banking community.

### **Deepening our connection with the banking community**

We will increase our direct engagement with the banking community, using communication and content that respond to their needs, feel relevant to their lives and enhance their wellbeing.

We will use thought leadership to enhance our reputation, build trust and confidence, and improve the wellbeing of banks

### **Equality, diversity and inclusion in everything we do**

We will ensure that equality, diversity and inclusion is a common thread that runs through all our work – that we're a welcoming, inclusive workplace for all; that the diversity of our community is represented at every level of our organisation and is able to fully participate in our work; that our services reach our full community and respond to the diversity of needs within it, and that we visibly represent and celebrate the diversity of our community in our work.

### **Strengthening our organisation**

We will ensure that our organisational governance reflects best practice in our sector, and that we have the operating model our organisation and our clients need for the future. We will develop our organisational approach to ESG (Environment, Social and Governance).

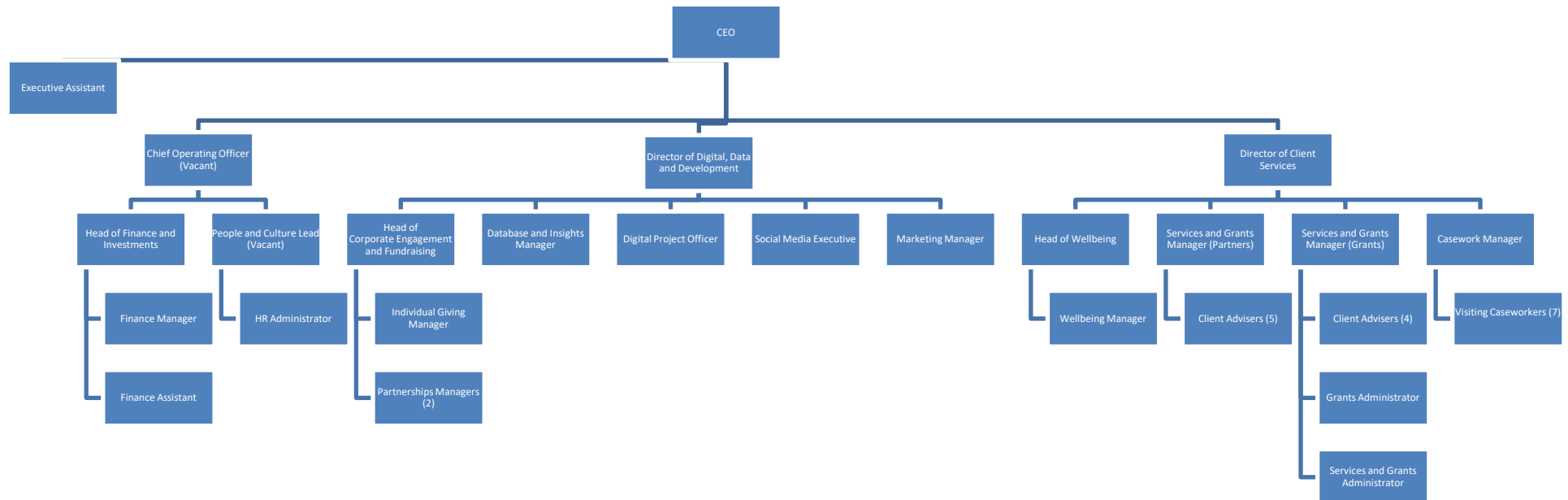
We will strive to be a leader in staff wellbeing, demonstrating our expertise through our actions, and will develop an organisational culture in which everyone is empowered to fully contribute our success.

### **Building our financial sustainability**

We will develop and implement a socially responsible investment policy that maximises returns whilst taking a balanced approach to risk and leveraging our assets to further our charitable purpose.

We will diversify our income to reduce dependence on investments and consider value for money in all of our decisions.

# Organisational structure



## Our values and behaviours

Bank Workers Charity's organisational values are **Integrity, Caring, Respect, Fairness and Achievement**.

Living these values applies to all employees and we value the services and relationships of those who share similar values, such as 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 link with and reflect our values.

Our values and what they mean				
INTEGRITY	CARING	RESPECT	ACHIEVEMENT	FAIRNESS
Our clients sit at the heart of everything we do.	We care about our colleagues and making a difference in the lives of the people we help.	We respect the people we work with, and the people we work for.	We take pride in what we do and work to get the best outcomes.	We treat people fairly and as individuals.
How we show our values				
We are professional, accountable and follow through on our commitments.	We make the effort to understand our clients' needs.	We empower our clients to make choices in order that they can improve their situation.	We are focused on quality and pay attention to getting things right.	We give each other timely and constructive feedback.
We put the shared interests of the Charity ahead of those of any individual or team.	We do our utmost to help our clients get where they need to be.	We treat people with dignity and respect.	We are innovative and creative; we push to find better ways of doing things.	We work to make everyone feel safe and encouraged to participate.
We are honest and ethical and build trust with our clients, partners and colleagues.	We build strong trusting relationships with the people we work with.	We don't just talk, we work hard to listen, understand and to be understood.	We proactively and willingly collaborate to share ideas and get the best results.	We embrace diversity and seek to be inclusive.
We are proud of our Charity and protect its good reputation.	We care about the wellbeing of ourselves and others, and speak up when things aren't right.	We communicate with clients, partners and colleagues in a clear and transparent way.	We are not afraid to try new things and to learn from our mistakes.	We aim to ensure everyone gets what they need - whether they're clients, partners or colleagues.
We support our colleagues to have the courage to speak out against inappropriate behaviour.	We work well with our colleagues as one team.	We challenge others respectfully and are prepared to be challenged.	We strive to exceed expectations of clients, partners and colleagues.	We say what we mean and we do what we say.
We collaborate and communicate openly and honestly.	We recognise the need for development of individuals and teams so that we can deliver great work.	We respect the beliefs and values of others, even if we don't share them.	We are custodians of the Charity and ensure the legacy of BWC is safe.	We seek to attract and retain the best colleagues.
We are determined to do the right thing and are committed to deliver the right outcomes.	We care about the quality and timeliness of the work we deliver.	We respect the environment we work in and do our utmost to make it a great place to be.	We are self-motivated, flexible, adaptable and embrace change.	We give credit where it's due and reward our colleagues fairly.

## Job description

### Client Adviser – Services and Grants

**Responsible to:** Services and Grants Manager

**Responsible for:** No direct reports

**Key purpose:**

To deliver holistic telephone and webchat advice and guidance on a wide range of issues, complete partner referrals and manage grant applications for a diverse client portfolio whilst ensuring that the support provided helps our clients achieve long-term sustainability. Support clients with appropriate advice, guidance and signposting.

**Principle Accountabilities:**

**Advice and Guidance - Helpline and Webchat Support**

- Act as first point of contact for new and existing clients through multiple communication channels (helpline, webchat and email), prioritising urgent and crisis cases when necessary.
- Conduct a holistic assessment of need and identify suitable support required. Provide advice and guidance on a range of general issues to people who are on low incomes, living with chronic or long term physical and mental health issues, in financial hardship and/or in crisis situations.
- Take ownership of a full case workload, prioritising clients' needs whilst managing expectations and facilitating a positive client journey through our services.
- Sensitively manage and signpost clients towards alternative sources of support.
- Provide emotional support as well as practical support when clients present with complex issues, 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 Services and Grants Managers, 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 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, in order for it to be presented for approval.
- Ensure targets are met and client caseload is managed in a timely manner.
- Refer clients where appropriate to our partners and liaise with partners on support provided to clients.
- Ensure income maximisation through the take up of appropriate benefits and effective budgeting advice.
- Ensure that all casework management conforms to quality standards which the service adopts.
- Ensure that all casework conforms to our systems, policies and procedures.

### **Administration**

- 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.
- Manage the paperwork and forms associated with grants and partner referrals.
- Contribute information and assist with the weekly grant payment run.
- Manage own diary in line with the needs of the service and rota requirements.
- Keep up to date with policies and procedures relevant to the role and undertake appropriate training.

Any other reasonable duties within the scope, spirit and purpose of the job, as defined by the Services and Grants Managers

### **Role Dimensions:**

No people responsibility.

No budget responsibility.

### **Contextual Information:**

The role is London based with hybrid working (currently 2 days per week office based for FTE).

Bank Workers Charity have assessed the post of Client Adviser as requiring an Enhanced level of disclosure. Any applicant who is offered employment will be subject to a Disclosure and Barring Service (DBS) check from the DBS before the appointment is confirmed.

## Person Specification

<b>Qualifications and Training</b> <b>Method of Assessment:</b> Application and Certificate Check	
Essential requirement	Desirable requirement
Not applicable	Degree level or equivalent
<b>Experience and Knowledge</b> <b>Method of Assessment:</b> Application, Interview and References	
Essential requirement	Desirable requirement
<p>Experience of working in a casework service and handling enquiries from multiple channels such as telephone, webchat and email.</p> <p>Experience of the welfare benefits system and the ability to identify possible entitlement and support clients with benefit checks.</p> <p>Significant experience of working with people who may be vulnerable, in distress or in crisis situations, acting with integrity and fairness while providing practical, long-term solutions.</p> <p>Experience of providing generalist advice, support and guidance to clients on multiple topics such as welfare benefits, budgeting, housing, employment, care, debt, mental and physical wellbeing and domestic abuse.</p> <p>Understanding of the charitable and grant giving community.</p> <p>Experience of working with external organisations (e.g. Bank Workers Charity partners) and managing client referrals and follow-up.</p>	Experience of using Live chat.
<b>Skills and Abilities</b> <b>Method of Assessment:</b> Application, Interview and Tests, if applicable	
Essential requirement	Desirable requirement
<p>Ability to review and assess grant applications (working within a grants criteria and assessing financial information).</p> <p>Ability to collate information and use it to produce accurate, detailed and objective grant reports and letters</p>	<p>A proven knowledge of the charity sector, agencies and local authorities.</p> <p>Experience of using Salesforce.</p>



<p>Experience of using databases and CRM systems (Salesforce) or similar.</p> <p>Experience of working with clients to a high standard with excellent customer service skills.</p> <p>Ability to communicate effectively to a broad range of clients within the banking community.</p> <p>Excellent and accurate admin skills/ability to write clearly</p>	
<p style="text-align: center;"><b>Personal Qualities / Competencies</b></p> <p style="text-align: center;"><b>Method of Assessment:</b> Application, Interview, References and Tests, if applicable</p>	
<b>Essential requirement</b>	<b>Desirable requirement</b>
<p>An understanding and appreciation of the complexities clients face.</p> <p>Ability to demonstrate empathy and good decision making skills alongside using initiative.</p> <p>Able to work calmly and productively under pressure and keep to deadlines.</p> <p>Strong team work ethic and happy to work in a small team.</p> <p>Adaptable to changing circumstances and receptive to new ideas, initiatives and a willingness to learn.</p>	

## Terms and conditions

### Client Adviser

**Starting Salary £35,790 per annum**

**Location:** Central London based with hybrid working (minimum two days a week office based)

### What we offer

- 28 days holiday, plus public holidays (with the option to buy additional leave)
- 8% employer contribution to Bank Workers Charity's pension scheme and up to 3% matched with employee contributions
- A wide range of employer funded wellbeing experiences through Heka
- Flexible benefit provision (including BUPA cash plan, cycle to work, payroll giving, retail discounts and electric car scheme)
- Group Life Cover (three times annual salary)
- Weekly wellbeing half hour
- Season Ticket Loan (upon successful completion of probation)
- Employee Assistance Programme

For more information about the Bank Workers Charity, please visit [www.bwcharity.org.uk](http://www.bwcharity.org.uk)

Bank Workers Charity is committed to supporting diversity and inclusion and welcomes applications from all backgrounds and communities.

