



Job Title: Client Services Administrator

Reporting to: Client Services Supervisor

Salary: £23,888 (pro rata 0.4), reviewed annually

Hours: 15 Hours worked over 3 days Mon, Thu, Fri

Contract Type: Permanent (6-month probation)

Benefits: Free parking, bus route access, cash healthcare scheme, 22 days holiday + bank holidays (pro rata for part time), no shifts or weekends, staff leave purchase/buy-back, external study support.

Role Purpose:

To provide administrative support to the Pennysmart Office, including the advice & casework team.

Key Responsibilities:

- Answer calls, handle communications, and welcome visitors.
- Set up new cases in AdvicePro.
- Send communications via email, post, and SMS.
- Contact clients to arrange Money Health Check appointments.
- Update referring officers on case progress.
- Support the Managing Director with calls, emails, travel, meetings, and reports.
- Manage office supplies efficiently.
- Oversee information storage and case closures.
- Support the money advice team with minor enquiries, messages, letters, and referrals.
- Update client cases and respond to queries promptly.
- Liaise with external agencies and creditors on client information.
- Write client case stories.
- Attend and take minutes at meetings, ensuring updates are shared.

General Responsibilities:

- Follow Pennysmart CIC's Equal Opportunities Policy.
- Ensure your own and colleagues' health & safety, reporting hazards immediately.
- Comply with GDPR 2018, ensuring all systems are logged with the Data Protection Officer.
- Efficiently handle and distribute all communications (post, email, SMS, phone) daily.
- Manage your workload independently, planning for varying referral levels.
- Provide cover for team members during absences.
- Maintain and update the administration procedures document.

PERSON SPECIFICATION

Essential:

Most important to us is someone able to align with the Pennysmart values and who wants to make a difference in the work they do.

We call this staying on 'TRACC'.....

Teamwork – providing unconditional support and respect, celebrating our differences, and harnessing our strengths.

Results – Getting the job done, making a difference to lives and achieving excellence.

Attitude – We choose to bring a 'can-do,' positive approach to all that we do.

Customer/Client Care – How our clients and partners view us, is our most valued asset.

Communication – As significant as breathing, it facilitates the sharing of knowledge, forms relationships and develops common values.

Helpful but not essential:

- Someone with administration experience in a small business or organisation environment.
- Ideally min 5 x GCSE's including Maths and English or equivalent.
- A capable team player, but equally at home working alone, able to work unsupervised
- Excellent attention to detail
- Either experience with IT (MS Word, Excel, SharePoint, OneDrive etc) or a strong affinity for digital to quickly learn. We rely heavily on digital for all needs and the direction of travel is to use it even more in future