Dear applicant,

Thank you for your interest in the role of Community Outreach Officer/ Money Guidance Officer with South Yorkshire Community Bank.

Please find enclosed:

- Background information on SYCB
- Job description & person specification
- Information on the money guidance framework

To apply please send your CV and an accompanying letter outlining how you meet the person specification to james.hook@sycb.co.uk by noon on Wednesday 16th September 2026.

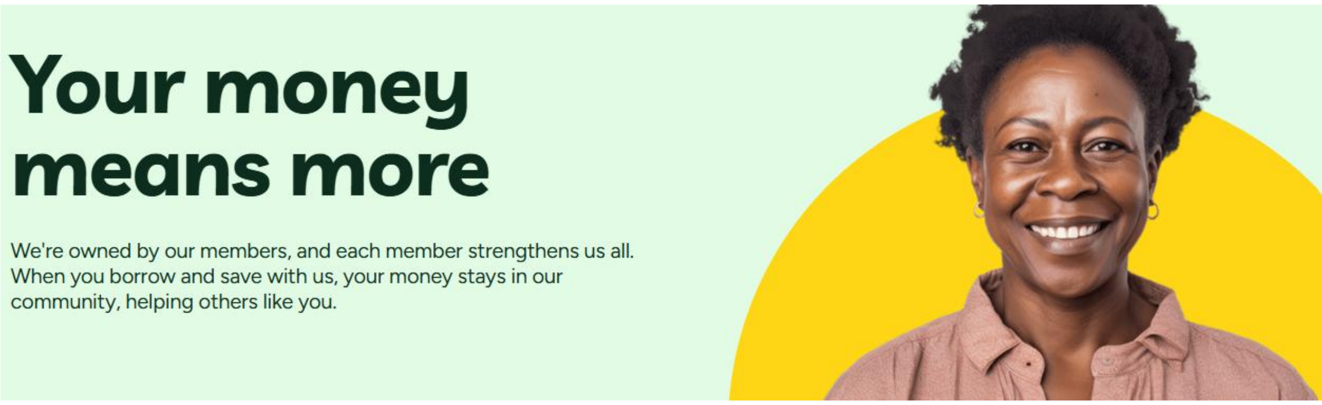
Interviews are planned for the 24th or 25th September.

Thank you.

James Hook

Head of Marketing and Business Development

South Yorkshire Community Bank- Background



We have recently rebranded to South Yorkshire Community Bank, as Sheffield and LASER Credit Unions merged together, so you will be joining us at a very exciting time in our organisation!

We offer saving, borrowing, budgeting and financial services which are safe, secure, and ethical. Unlike traditional banks, we're member-owned and not-for-profit.

This means anyone who is a member owns a part of South Yorkshire Community Bank.

Any money we make on top of the cost of running South Yorkshire Community Bank is used to improve our services for our local community or is paid back to our members.

We've been around for over 20 years and have over 7,500 members.

No fuss, just fair
We're open and welcoming to all. Always inclusive, always accessible. We never assume and never judge. And we always talk to members in straightforward ways that are easily understood.

Human to human
We offer a safe, stable and reliable place for our members. Where we listen carefully and with respect, so that they feel heard and understood. We support them with proactive, positive, personal care.

What's it like to work at South Yorkshire Community Bank?
Whether you are working for us or volunteering, our people are our biggest asset. They support our members when and how they need it. Listening to their needs and helping them to find what's best for them.

South Yorkshire Community Bank

Job Title: Community Outreach Officer/Money Guidance Officer

Organisation

South Yorkshire Community Bank is a not-for-profit organisation, offering savings and loans to our members across South Yorkshire. Established in 2004, we have grown to provide our members with low cost, affordable loans and great ways to save. SYCB is a co-operative, which means we are owned by our members.

Role Name	Community Outreach Officer/ Money Guidance Officer
Reports To	Head of Marketing and Business Development
Contract Type	18 months (subject to successful completion of a probationary period) Full-Time (35 hours per week)
Salary	£27550
Location	Primarily working in community settings, but with a base at our offices at 2 Effingham Square, Rotherham S65 1AP.
Role Purpose	This role is responsible for providing money guidance support to people in community settings primary across Rotherham with occasional travel to Sheffield. Full training will be provided, and you will need to be able to explain financial concepts in simple terms and support volunteers to access the online training available. See Money Guiders for more details of the money guidance approach to having money conversations. The role requires a people person with excellent communication skills, the ability to multitask, and ability to work independently outside the office.
Key Responsibilities	**Outreach work delivering Money Guidance:** • provide impartial information and guidance in a friendly and professional manner. • signpost customers to appropriate sources of further support, advice or information. • well-developed questioning and listening skills, and the confidence to deal with complex cases. **Administrative Support:** • Perform clerical duties such as filing, data entry, and managing correspondence. • Maintain accurate records and ensure compliance with regulatory requirements.

	Team Collaboration: • Work closely with other departments to ensure smooth operations and high-quality member service. • Participate in team meetings, training sessions, and professional development activities.

Person specification

- Excellent communication and interpersonal skills.
- Strong organisational abilities and attention to detail.
- Basic understanding of financial principles desirable - not essential
- Customer-focused with a positive attitude and a desire to help others.
- Ability to work independently and as part of a team.
- Eagerness to learn and adapt in a dynamic environment.
- High level of integrity and confidentiality
- Non-judgmental to the wishes of the customer but not allow feelings of empathy to influence the provision of guidance
- Ability to drive and access to own vehicle preferred

Qualifications/experience:

- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint) and willingness to learn credit union-specific software.
- GCSE or equivalent Math's and English (Grade 4) Essential
- Previous experience in finance and administrative roles desirable but not required.

August 2026

See https://maps.org.uk/en/our-work/money-guiders for information on the money guidance framework.

Here is a summary:

Money Guidance
Money guidance is a service provided by organizations or practitioners who offer non-regulated financial advice to individuals or groups. It is designed to help people make informed decisions about their finances, whether it be managing debt, planning for retirement, or understanding pensions. Money guidance is often given alongside wider support and is government-backed, ensuring that the advice provided is safe and effective.

Money guidance can be provided in various ways, including face-to-face sessions, online services, and telephone support. It is important to note that money guidance does not involve regulated financial advice and is not intended for individuals seeking formal financial advice.

For more information on money guidance and how to access it, individuals can visit the Money and Pensions Service website or contact MoneyHelper for free and impartial help with money matters.