

# Inverness, Badenoch and Strathspey Citizens Advice Bureau



**Job title:** Advice and Services Manager

**Reporting to:** Chief Executive

**Purpose of Role:**

To ensure that the organisation provides high quality advice services to clients and funders ensuring that all cases are recorded and managed in accordance with best practice.

To work together with other members of the Senior Leadership Team within the Bureau to deliver the service.

**Location:** Working across various locations to provide dedicated time in the primary service locations across the area, currently:

Inverness

Aviemore

NHS Highland locations within Inverness, Badenoch and Strathspey

Depending on the needs of the service, work may be carried out at outreach locations throughout our area as required.

**Salary:** Scale between £32,000 up to £38,080 per annum (depending upon experience and ability to perform all aspects of the role immediately upon appointment).

**Benefits:** 35 days annual leave including public holidays and a 5% employer's contribution to pension

**Hours:** Full time - 35 hours per week (Monday to Friday, core hours are 09:00 – 17:00). Job share considered.

**Term:** Permanent

**The application process:**

Application deadline: **Saturday 28 August 2021 at Midnight**

Interview date: **Week commencing 13<sup>th</sup> September 2021**

Interview location: Inverness

Interview format: 10-minute presentation and 50 minute panel interview.

**Please email applications to:** [aldasair.christie@invernesscab.org](mailto:aldasair.christie@invernesscab.org)

### **Description of Role**

Inverness Badenoch and Strathspey (IBS) CAB exists to serve its community and meet their need for information and advice in the most accessible format. Volunteers are at the heart of that service, advocating a model of community social responsibility and resilience. A key part of this role, is to support the delivery of advice, in a way that grows and adapts to the needs of the community and changes in line with policy and legislation, where volunteers from across the community are supported to gain the knowledge, skills and confidence to help others in need.

In addition, you will be responsible for the delivery of comprehensive advice services across the area, in accordance with Citizens Advice Membership Standards, Scottish National Standards for Information and Advice Providers and Financial Conduct Authority Accreditation. This will include Housing Advice, Money Advice, Welfare Rights Advice, Energy Advice as well as Generalist Advice. Employment Advice responsibility presently is overseen by another manager and this may in the future be added to the portfolio.

You will oversee specialist advice expertise, including complex case management, training, coaching and supervision of general and specialist advisers (both staff and volunteers), ensuring policy and practice meets all legal and regulatory quality of advice standards and working as part of the management team to ensure continuous development of our services.

A key part of this role will involve examining management information – primarily samples of case records and case checking – to identify any gaps in consistency of approach and practice across all IBS services relating to the advice areas previously specified and, in partnership with other managers and the CEO; identifying actions that need to be taken to improve practice. The responsibility to ensure high qualities in advice giving standards is a key part of the role.

You will work as part of the management team to pro-actively ensure that we maintain the knowledge, skills, expertise and resources necessary to meet client demand for advice to the standards required.

You will monitor trends in client contact and developing social policy and legislation to help deliver on our twin aim of exercising a responsible influence on the development of social policies and services, both locally and nationally, and representing the organisation in relevant forums to achieve that aim.

As part of the management team, you will help develop and deliver against the organisation's strategy, with a view to maintaining the highest standard of compliance and where require, increasing the capacity and/or efficiency of our money advice services to meet current and future demand.

In order to provide many of our services our relationship with funders is of critical importance and together with the Business Development Manager the role will include providing reports, presenting and analysis of project outcomes ensuring that funders reporting requirements are met.

In meeting the Key Responsibilities of the role the post holder has supervisory support from staff including covering Housing Advice, Welfare Rights Advice, Money Advice, Multi-channel Hubs and Triage/Gateway Services.

## **Key Responsibilities:**

### **1. Quality of Advice and Audit:**

- Maintain a good standard of knowledge across all advice topics.
- Undertake complex case management, up to National Standards Level 3 in relevant advice areas, and maintain the infrastructure required to sustain that for the organisation.
- Ensure that accurate advice information is being provided across the organisation and that accurate, legible and comprehensive case records are kept. This should be achieved by:
  - Maintaining up to date policies and procedures
  - In conjunction with the Training and Development Manager undertake training, coaching and briefing sessions for advisers on site and across the organisation, to ensure they remain up to date with and delivering advice to regulatory standards.
  - Undertaking quality of advice audits on a percentage of advice cases, including audits of case records and information sources, to help ensure continuity and consistency of holistic advice.
  - Undertaking quality of advice audits on a percentage of other case records, to meet regulatory standards for peer review.
  - Addressing deficiencies in practice as soon as soon as practical, including providing training, support and coaching, in partnership with relevant line managers as required.
- Ensure evaluations are completed that demonstrate positive outcomes for clients
- Assist in audits of the organisations performance, by compiling information, interrogating management information and preparing reports that help identify remedial actions required by the service.

- Prepare full, accurate and regular reports on advice activity as required by the Chief Executive
- Ensure case recording accurately reflects the holistic advice provided and the impact and outcome required for CASTLE reporting.

## **2. Management of staff and volunteers:**

- To oversee the day to day running of the Bureau operationally.
- Provide support and technical advice to staff and volunteers during the live advice session.
- Line manage staff and volunteers, including those providing specialist advice, through regular support, supervision and annual appraisal.
- Take responsibility for managing any advice services that have been developed by the Bureau that become part of our continued service provision.
- Set targets and goals to ensure continued professional development of staff and volunteers, in accordance with the requirements of their role and to maintain expected quality standards.
- Hold regular staff meetings, ensuring discussion and awareness of all IBS matters.
- Be a key player in the organisation and delivery of the Adviser Training Programme in partnership with the management team.

## **3. Networking and alliance building:**

- Maintain and develop positive working relationships with funders and other agencies
- Liaise with and maintain links with appropriate statutory, voluntary and professional bodies, in the promotion and development of our services
- Contribute to and participate in the wider networking and alliance building activities of IBS CAB.

## **4. Campaigning and Influencing:**

- Deliver on our twin aim of campaigning for change through social policy and impact analysis. In particular, being responsible for data collection and interrogation, reporting, campaigns, website content, media profile and broader community and partner engagement and representing the organisation on relevant forums.

## **5. Financial:**

- As part of the management team, assist with identifying and completing funding applications and making representations to funders as required for the advancement and maintenance of money advice services.
- Work with the CEO to control spending within the limits set by the Board.
- Liaise with funders and provide reports and evaluations as required.
- Ensure resources are planned, monitored and used effectively.
- Use management information to ensure services are delivered within agreed budgets.
- As part of the management team, assist with understanding and implementing effective financial controls.

## **6. Management Team Working:**

- Work as part of the Management Team, to ensure the delivery of strategic priorities and to respond to client need, developments in the advice sector and changes in social policy and legislation.
- Develop effective relationships with IBS staff and volunteers across the organisation, to maintain a close correlation between all other services delivered by the organisation.
- Introduce new ideas, approaches and/or best practices that add value to our services.
- Support colleagues in delivery of services, providing management cover as required.
- Undertake peer reviews and monitor audit outcomes to help ensure the organisation is meeting regulatory standards across all services.
- Carry out any other reasonable tasks as requested by the Chief Executive.

## **PERSON SPECIFICATION:**

### Essential criteria:

#### **Qualification:**

- Qualified to degree level or equivalent or able to clearly evidence the ability to carry out the tasks due to the level of report writing, data analysis and analytical skills required.

#### **Technical skill:**

- A good understanding of the procedure to challenge benefits decisions.
- A good understanding of how to challenge housing status decisions by the Local Authority.
- A good understanding of money advice and debt advice outcome strategies.
- A good understanding or the willingness to upskill to be able to oversee employment advices services within the bureau.
- A good understanding of how to access up-to-date money, housing and welfare rights advice policy and legislation and its application.
- Demonstrable experience of dealing with complex advice cases.
- Proven ability to meet targets and deliver successful outcomes.
- Experience of designing and delivering training/coaching including using a range of learning methods such as presentation, facilitation, coaching, peer and social learning techniques.
- Ability to coach and develop others in providing advice.
- Experience of staff and volunteer management and support.
- An evidenced commitment to continuous professional development.
- Proficient in use of IT systems and Microsoft Office programs including Outlook, Excel, Teams, Word and PowerPoint with a willingness to learn new systems.
- Ability to provide high quality reports against project targets and outcomes.
- Ability to network and promote our service to partner organisations, including strong stakeholder management experience.

- Ability to work under pressure with limited resources.
- Demonstrable commitment to helping volunteers achieve their potential.
- Demonstrable experience of contributing to organisational change and development.

**Values and Behaviours:**

- Excellent interpersonal and communication skills.
- Strong communication and team working skills.
- Persuasive and diplomatic with strong influencing skills, able to adapt personal style to different situations and individuals.
- Approachable and friendly; able to build strong working relationships with a range of stakeholders, based on trust and respect.
- Ability to maintain confidentiality at all time.
- A positive can-do approach to problem solving and challenging situations
- Demonstrable commitment to the aims and principles of Citizens Advice.