**JOB DESCRIPTION AND SPECIFICATION**

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| **Job Title** | Advisor | | **Reports to** | | Duty Manager |
| **Location:** | Hybrid/ | | **Travel:** | | May be required |
| **Salary:** | £26-29k depending on skills and experience | | **Position: Type** | | Full time Positions: 34 hours over 4 days  Part-time applicants will also be considered |
| **HR Contact:** |  | | **Closing Date:** | | 24 April 2023 |
| ORGANISATION CONTEXT  Here at Money Matters we are building an integrated and inclusive first-class organisation. Our aim is to deliver a holistic financial inclusion service to our clients. The Advisor function is a key component in the effort to establish best practice advice giving, working in close partnership with Management Team and all relevant teams within Money Matters. The main focus of the Advisor is to deliver a comprehensive financial inclusion/capability/energy service working at a level expected by the Scottish National Standards to all service users. The role will be to advocate on behalf of Money Matters clients to creditors, benefit authorities etc. and to provide an understanding of processes etc. | | | | | |
| ROLE AND RESPONSIBILITIES   * To consult with the client to establish their financial/debt situation by face-to-face, email or telephone interview at the offices of Money Matters or outreach locations as required. * To provide a benefit checking service to ensure Benefit Maximisation as well as financial capability work. * To provide guidance, information, representation and support in the areas of welfare benefits and money advice at up to Type 3 of Scottish National Standards (SNSIAP) (Tribunal Representation not required with these positions). * To communicate effectively with third parties on behalf of the client. * To manage a case load efficiently and carry out detailed financial inclusion casework on the client’s behalf. * To signpost clients to other relevant specialist resources where appropriate. * To provided budgetary advice where appropriate. * To maintain accurate computer records in line with Money Matters procedures using AdvicePro case management system. * To ensure all client mandates are completed and maintained in line with current GDPR legislation. * To keep abreast of current legislation relevant to the Financial Inclusion sector and to be accountable for own personal development. * To ensure all benefit advice is delivered in line with Quality Standards/SNSIAP. * To actively participate in any training or activities to improve advice practices and business processes. * To adhere to the policies and procedures of Money Matters. * To perform any other related duties which may be required to produce an effective outcome in your day-to-day tasks and objectives. | | | | | |
| **ATTRIBUTES** | | **ESSENTIAL** | | **DESIRABLE** | |
| **WORK EXPERIENCE** | | | | | |
| Expert current knowledge of welfare benefits both from DWP and SSS | | Yes | |  | |
| Experience of providing advice to clients face to face | | Yes | |  | |
| Experience of providing advice to clients via telephone and email | | Yes | |  | |
| Experience of identifying crisis/emergencies for clients | | Yes | |  | |
| Experience of offering holistic advice | | Yes | |  | |
| Experience of managing a caseload | | Yes | |  | |
| Experience of effective signposting/referrals | | Yes | |  | |
| **SKILLS AND ABILITIES** | | | | | |
| Excellent literacy and numeracy skills | | Yes | |  | |
| A knowledge of relevant IT systems and practice | | Yes | |  | |
| Experience of using AdvicePro | |  | | Yes | |
| Ability to document clear and accurate case notes | | Yes | |  | |
| Ability to pro-actively manage caseload (review cases, update cases, identify and work to time scales) | | Yes | |  | |
| Ability to write a comprehensive case study for funders etc | | Yes | |  | |
| Ability to perform manual benefit calculation | |  | | Yes | |
| **PERSONAL QUALITIES** | | | | | |
| Ability to work alone | | Yes | |  | |
| Ability to work in a collaborative manner | | Yes | |  | |
| Excellent communication skills | | Yes | |  | |
| Ability to pro-actively manage workload and to adapt in line with changing priorities | | Yes | |  | |
| Ability to adapt to and thrive in the pressures of the role | | Yes | |  | |
| Ability to pro-actively keep knowledge and skills up to date | | Yes | |  | |
| Ability to work effectively with families during stressful situations and adapt approach to each case as required. | | Yes | |  | |
| **ADDITIONAL JOB REQUIREMENTS** | | | | | |
| Driving license & own car | |  | | Yes | |
| Flexibility/some evening work may be required | |  | | Yes | |