

Parkhead Citizens Advice Bureau
Money Adviser Post - JOB DESCRIPTION



Salary: £27,500 (pay review annually + plus pension, NI etc)

Annual leave : 27 days, plus 13 days Public Holidays Total : 40

Hours : Full time - 32 hours over 4 days (as well as flexible working hours policy in place and Hybrid working)

Responsible to: Assistant Manager/ CEO

Type of Contract: Permanent (subject to funding)

Requirements: Appropriate Disclosures

Post Summary

The post of Money Adviser is a key post with Parkhead Citizens Advice Bureau. We believe strongly in making a difference for our community and our clients. Our aim is to ensure that no one suffers through lack of knowledge of their rights and entitlements and that equally through social policy action we strive to make long lasting changes for everyone.

The post holder will contribute to this through providing specialist money, financial capability and welfare rights information and case work.

MAIN TASKS:

1. Delivery of Specialist Type III Money/Debt advice and financial capability case work
2. Assisting clients with benefit claims, housing advice, reviews/MR and appeals and other general advice topics including identifying other supports and agencies via the holistic and person centred advice approach and to maximise income as part of the money advice process
3. The ability to provide support, training and supervision to volunteer advisers and other paid advisers
4. Able to provide talks. Training and information to communities and stakeholders on key money advice issues and information
5. Assist in producing, maintaining and distributing appropriate information materials including online
6. Commitment to Social Policy and feedback on issues clients are facing to effect change
7. Keep such records (including the maintenance of a database) as required to enable the service to be monitored and evaluated
8. Working knowledge of case work, case recording and using money advice software, ideally CASTLE, Advicepro or similar. Able to case record accurately and to standards set by Citizens Advice Scotland audit and Scottish National Standards Audit.
9. Commitment to their own personal development and training. The post holder will be expected to maintain their knowledge in welfare rights and money advice and related

issues in order to meet the competences required by Scottish National Standards for Information and Advice Providers and Financial Conduct Authority duties for money advisers.

10. Provide regular written reports to the Assistant Manager/CEO on activities against targets
11. Good working knowledge of Microsoft packages including Word and Excel
12. Undertake any other work, consistent with the purpose of the post, as directed by the Assistant Manager/Manager
13. Implement Parkhead CAB's policy and procedures, ensuring that all practices and procedures are undertaken in accordance with these and including health and safety and that all volunteers for whom you may be responsible are aware of their responsibilities in respect of their role, monitoring data and recommending action as required
14. Comply with the data protection regulations, ensuring that information on clients, supporters, employees and volunteers remains confidential
15. Ensure that the aims and principles of Citizens Advice are followed and upheld at all times
16. Able to cover community venues, outreaches and home visits where required

PERSON SPECIFICATION

Money Adviser

We are looking for someone who can demonstrate the following essential attributes:

- Enthusiasm and a can do attitude with a warm and friendly nature
- Commitment to the aims and principles of the organisation
- Commitment to the principle of a non-judgemental, compassionate and client driven service. Experience of working with a wide variety of clients, including vulnerable clients
- Proven experience (paid or unpaid) in money, housing and financial capability advice work and ideally experience in bankruptcy/sequestration applications and assistance. Knowledge and experience in other general advice topics.
- In-depth current knowledge of the benefits system and money advice legislation.
- Experience of carrying and managing a complex caseload. Carry and keep comprehensive records of casework which meet audit requirements of CAS. Scottish National Standards for Information and Advice and relevant funders' requirements. Keep all records confidential, safe and accessible for future retrieval.
- Ability to work under pressure, on your own initiative, but also to be part of a team

- Commitment to working to and championing the organisation's policies and procedures
- Excellent organisational, communication and report writing skills
- Good IT skills and a commitment to digital skills
- An ability to deal with clients and other professionals in a sensitive manner
- Ability to administer sensitive and confidential information with discretion including knowledge of data protection protocols
- Commitment to the organisation's Equal Opportunities Policy
- Agreement to undertake all relevant and mandatory training
- Ability to manage stressful interactions, ensuring your own self-care

Criminal records check

Appointment to this post will be subject to a satisfactory criminal records disclosure

<i>Money Adviser</i>	<i>COMPETENCIES</i>
EXPERIENCE	<ul style="list-style-type: none"> • Experience in delivering advice • Experience of working with people with multiple and complex needs • Experience in preparation and presentation of casework including case recording • Experience of liaising effectively with partner agencies
KNOWLEDGE	<ul style="list-style-type: none"> • A sound working knowledge of social security benefits including UK wide and Scottish specific • Good working knowledge of generalist advice issues including financial issues affecting clients.
SKILLS AND ATTRIBUTES	<ul style="list-style-type: none"> • Excellent written and oral communication skills, including the ability to communicate complex information in a clear and accessible manner • Skilled in research and analysis of information • Excellent organisational skills • Ability to use a range of IT tools, including Microsoft Office applications, online applications, internet and email etc • Ability to work without close supervision, prioritise own work and meet deadlines
VALUES AND ATTITUDES	<ul style="list-style-type: none"> • An understanding of, and commitment to, the aims, principles and policies of the CAB service • Ability to operate as a team player and communicate effectively with clients, colleagues and managers.
OTHER	<ul style="list-style-type: none"> • Flexibility in carrying out the responsibilities of the post • Ability to travel to carry out home visit, cover outreaches and other venues and events when required

REQUIRED TRAINING

Previous completion of the Citizens Advice Bureaux Adviser Training Programme and Money Advice Training Resource Information and Consultancy Service (MATRICS) training is desirable. If this has not already been completed, the postholder will be expected to complete this. The post holder will be required to undertake specialist benefits training in order to meet the competences required by Scottish National Standards for Information and Advice Providers. Training will be undertaken by attending courses on the mainland and by online learning.