



Citizens Advice Taunton
St Mary's House
Magdalene Street
Taunton, TA1 1SB

tauntoncab.org.uk

Citizens Advice Taunton

One Team Money Matters Advisor
(fixed term appointment until 30-6-19)

Role Description & Person Specification (March 2018)

Reporting to

Projects Manager

Context

The One Team Money Matters Advisor will work closely with other agencies and partners to support individuals and households who are struggling with money and household bills even to the point where their tenancies may be at risk.

Working as part of the multi-agency team, they will tackle the issues that present barriers to getting into work, help to create stable households and prevent anti-social behaviour. They will assist clients to manage their debts and money issues and in addition will deliver financial education: this includes budgeting skills, opening bank accounts, help in changing energy suppliers, recognising eligibility for social tariffs – all preventative and early intervention techniques that will empower the client to help them manage their money and also stop them getting into a cycle of debt. This will assist clients to sustain tenancies and promote independent living, particularly relevant for those who are socially excluded and vulnerable, young people and those with poor mental health.

Role Description

Casework

- Provide casework.
- Negotiate with third parties as appropriate.
- Ensure income maximisation through the take up of benefits.
- Offer representation at tribunals, and other situations, where appropriate.
- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

Networking

- Establish, develop and maintain a range of partnerships to reach clients and learners and gain support for the project.
- Develop literature to promote the project and carry out other marketing activities such as writing press releases or delivering presentations.
- Attend relevant external meetings.
- Assist in developing relationships with potential funders and other partner agencies.
- Assist in the compilation and submission of funding bids for the project.

Financial Education activities

- Deliver financial capability learning activities (e.g. small group training, one to one mentoring).

- Ensure that learning activities are well organised.
- Collate and review feedback on learner outcomes and the quality of the service.

Research & Campaigns and monitoring

- Assist with Research & Campaign work by providing information about clients' circumstances through the appropriate channel.
- Provide statistical information on the number of clients and nature of cases and provide regular reports to office management.

Other duties and responsibilities

- Establish and maintain effective and efficient administration systems.
- Use IT for statistical recording, record keeping and document production.
- Participate fully in the life of the office, attending workers' meetings, internal planning events etc, as agreed with line manager.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Carry out any other appropriate tasks requested by management, to ensure the effective delivery and development of the service.

Person specification

Essential

- Previous completion, or the ability to quickly complete the following;
 - Citizens Advice advisor training
 - M.A.S. accreditation for meeting the relevant FCA debt advice requirements
- Knowledge & experience of debt advice and financial literacy.
- Ordered approach to casework.
- Excellent interpersonal, communication and presentation skills.
- Ability to collect, analyse and present project data and monitor progress against objectives.
- Experience of establishing and developing partnerships with other agencies and joint working.
- Understanding of theory and principles of adult learning and development.
- Ability to sensitively empower and engage with adults who have had poor experiences of formal education.
- An ability and willingness to work both on own initiative and as part of a team.
- Ability to self-motivate and organise a diverse workload.
- Ability to use IT applications to record statistics, produce documents and training materials and keep accurate project records.
- Understanding of and commitment to the aims and principles of the CA service and its equal opportunities policies.

Desirable

- Representation at tribunals or court.
- Experience of delivering financial literacy education.
- DRO Intermediary status.
- Understanding the theory and principles of adult learning and development.

Terms and conditions for this role:

Due to funding this is a fixed term appointment until 30-6-19.

Location: Based at St Mary's House, Magdalene Street, Taunton, TA1 1SB, also with time in the One Team localities

Hours: 15.0 hours per week, which must include the Thursday outreach session at Priorswood

Salary: £22,000 pa, pro-rata

Appointments to this post are subject to an enhanced DBS check.