

Money Talk Adviser

Job Description and Person Specification



About the role:

The Money Talk Outreach Worker will play a key role in the delivery of an innovative multi-channel financial health check service in the Citizens Advice Bureau network in Scotland. This project aims to improve access to and the efficiency of financial health checks for vulnerable families and older people.

Main responsibilities

Referred individuals will be able to receive a financial health check; provided with information on benefit entitlement and income maximisation; and be offered holistic advice tailored to their circumstances, available through telephone or face-to-face appointments. Each client will receive the same quality of information and advice no matter how they access the service.

Advice giving

- To run regular open door confidential advice sessions. Locations, number, duration and venue to be determined in consultation, both with the Bureau Manager and other staff, and through liaison with local agencies and groups.
- Interview clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities.
- Use the Citizens Advice Information System to find, interpret and communicate the relevant information.
- Research and explore options and implications so that clients can make informed decisions.
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
- Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
- Refer internally or to other specialist agencies as appropriate.
- Ensure that all work conforms to the bureau's Office Manual and Quality Standards at the appropriate level.
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

Social policy

- Assist with social policy work by providing information about clients' circumstances through the appropriate channel.
- Alert clients to social policy options.

Professional development

- Keep up to date with legislation, policies and procedures and undertake appropriate training.
- Read relevant publications.
- Attend relevant internal and external meetings as agreed with the line manager.
- Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate.

Administration

- Use IT for statistical recording, record keeping and document production.
- Ensure that all work conforms to the bureau's systems and procedures.
- Provide statistical information on the number of clients and nature of cases.

Other duties and responsibilities

- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
- To share evening and weekend operational hours on a rotational basis with other paid staff.
- Demonstrate commitment to the aims and policies of the CAB service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

Person specification

	ESSENTIAL	DESIRABLE
Experience	• A minimum of at least 1 year experience in working in the CAB service. • Experience in giving advice on a range of subjects to members of the public covering Money, Housing, Social Security, Employment and Legal advice. • A working knowledge of the procedures of the citizens advice service • Must be able to accurately calculate social security entitlement through QBC/Lisson Grove or some other reputable software.	• Writing formal letters and preparing reports, plans and proposals • Specialist experience in core CAB advice subjects • Certificate of Money advice Service Quality framework(GGDA) to minimum of Advice level or equivalent
Skills and attributes	• Ability to communicate and establish good relationships with a range of people • Ability to work without close supervision, prioritise own work and meet deadlines • Ability to deal with difficult situations in a calm, effective non-confrontational manner • Ability to communicate effectively, both orally and in writing • Ability to network with other groups within the community • Ability to gather and accurately record statistics	• Ability to work as part of a team and on own initiative • Understanding of the needs of people who may be vulnerable, distressed or under stress • Ability to produce statistical and written reports to funders • Ability to look at the development of services and implement improvements with minimal input

	• Excellent organisational skills • Ability to work under pressure	
Knowledge	• An understanding of Castle case recording systems and procedures • An understanding of the needs of the funders relating to clients, client profiles, recording of cases and financial gain.	• Knowledge of local voluntary organisations
Values and attitudes	• An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of the Bureau.	• An understanding of the need for partnership working and a proactive approach to same.
Other	• A willingness to identify and undertake relevant training • Ability to work flexibly and to travel to a variety of locations within the area	• Valid driving licence as some travelling within the bureau operating area will be required