# CITIZENS ADVICE BUREAU

# Job Description Family Financial Education Worker

Job Title: Family Financial Education Worker

Salary: £21040 –Pro Rata

Holidays: Statutory Holidays Apply

Hours of work: 17.5 hours per week. There will be occasional requirements to provide evening sessions, however these will usually be planned to suit in advance either by adjusting hours or time off in lieu.

Probationary Period: 26 weeks

Notice Period: 4 weeks

Contract Period: Time limited project, funding has been awarded until September 2016

Responsible to: Manager

Line Supervision: Project Volunteers

Overview: The post holder will be responsible for developing and delivering financial capability sessions at community locations across North Lanarkshire, focusing on organisations that support families e.g. YMCA, Community Learning & Development, Social Work Children & Families & Youth Justice, Covey Befriending, parent & toddler groups, Turning Point, Women's Aid, North Lanarkshire Council Housing, NHS and registered The post-holder will have responsibility for planning group training sessions as well as one to one coaching sessions when applicable.. Learning will be evaluated through client user surveys and other feedback.

# Tasks Description

**As part of the Tackling Money Worries project the Financial Education worker will plan and provide financial capability sessions**

* Work with learners and partner agencies to identify the learners financial capability needs.
* Devise effective learning activities, including adapting training materials from Citizens Advice and others.
* Create appropriate publicity materials to promote training / learning events and workshops
* Deliver tailored financial capability learning activities (adult and youth groups).
* Create a warm and friendly environment in which learners can feel safe, supported and relaxed to express their needs.
* Ensure that learning activities are well organised (e.g. room bookings, equipment and refreshments).
* To set up and maintain equipment/software to enable production and delivery of information and communication technology training at individual client sessions and at group workshops.
* In collaboration with the Bureau Manager and Project Co-ordinator, design and produce systems to monitor and evaluate learning by Tenants and the impact of the learning.
* Produce user friendly resources - handouts and booklets for self-help guidance – to be available in electronic formal and hard copy versions.
* Ensure systems are in place to collect feedback on what learners have learnt and been able to put into practice.
* Collate and review feedback on learner outcomes and the quality of the service.
* Identify at the end of each session learners that require one to one support and make appropriate referrals.
* Compile monthly reports when requested by Management

## Volunteers

* In collaboration with the Manager develop and deliver training session for project volunteers to enable them to assist with technical aspects of the project.

**Professional development**

* Identify and implement plans for own training and development needs.
* Keep up to date with personal finance topics, available training materials and other resources.
* Reflect on effectiveness of learning activities delivered and review training practice.
* Prepare for and attend supervision sessions / team meetings /staff meetings as appropriate.

**Other duties and responsibilities**

* Establish and maintain effective and efficient administration systems for the delivery of the project.
* Use IT for statistical recording, record keeping and document production.
* Carry out administrative tasks related to the job such as photocopying learner evaluation forms, circulating attendance lists and confirming venues.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
* Carry out any other appropriate tasks requested by the manager, to ensure the effective delivery and development of the service.
* Adhere to the aims and principles of the Citizens Advice Bureau service and the good practices and policies of Motherwell & Wishaw Citizens Advice Bureau which include those contained within the Staff handbook; the Bureau’s Dignity Charter; Information Assurance Handbook for staff and volunteers; the Data Protection Act guidelines; Computer Usage Guidelines and other policies and guidance relating to the safe and appropriate use of information technology.
* Adhere to confidentiality at all times in relation to information accessed through role involvement.
* Any other task that is determined to be reasonably requested of this new and developing post

# Person Specification

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|  | **ESSENTIAL** | **DESIRABLE** |
| **Qualifications** | Relevant vocational qualification and/or training  Good standard of general education  Valid driving licence | Evidence of CAB training/qualification |
| **Experience** | Proven experience of working in financial environment, budgeting expertise or financial education  Ability to sensitively empower and engage with adults who have had poor experiences of formal education.  Understanding of theory and principles of adult learning and development.  Ability / experience of planning and developing learning activities.  Experience of developing partnerships with other agencies and joint working. | Experience in Money Advice provision  Experience of working in the Financial Capability sector  Production of promotional materials  Promotional experience  Project Management  Experience of working with volunteers |
| **Skills, Knowledge and Attributes** | A good knowledge of the personal finance issues that affect adults at risk of financial exclusion.  Ability to monitor progress against objectives and working with a range of partners.  Ability to collect, analyse and present project data.  Ability to set up and use systems to collect, collate and share information about project achievements and outcomes.  Proven organisational and administrative skills  Ability to prioritise competing deadlines and multi-task | Statistical recording for evaluation/monitoring. |
| **Values and Attitudes** | Understanding of and commitment to the aims and principles of the CAB service and its equal opportunities policies.  A willingness to learn and develop and reflect on practice.  Excellent interpersonal skills, including the ability to relate and work with a large variety of different people.  Ability to monitor and maintain own standards.  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.  Numerate and literate to the level required by the tasks.  Effective written and oral communication skills.    Ability to use IT applications to record statistics, produce documents and training materials and keep accurate project records. | Proven ability to work within a community development or volunteer setting  Understanding of problems experienced by people with low incomes |
| **Other** | Access to own transport |  |