**Job Title:** Money Support Worker

**Responsible to:** Chief Officer

# About the role

The Money Support Worker will provide practical support around finances to people experiencing difficulties with their mental health and wellbeing. This will involve tasks like benefit checks, support around managing bills and reducing outgoings, support with budgeting or onward referrals to Angus CAB’s Debt Team where specialist debt advice is required. The Money Support Worker will work in a holistic and person-centred way with each client to provide this support.

# Job description

**Key responsibilities**

* Receive referrals from both internally within the Bureau and from our external partners
* Communicate with clients by telephone, e-mail and face-to-face to identify the needs of the client and how and where support can be given
* Advise clients on ways to maximise income by checking benefit entitlement including ‘better-off’ calculations, checking tax codes or entitlement to grants or other options for increasing income
* Provide practical support and guidance around money advice – such as budgeting, reducing bills, ways to manage money better
* Record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
* Make onward referrals where appropriate to other projects within Angus CAB and/or external agencies
* Build and maintain relationships with partner agencies across Angus who are supporting people with mental health issues
* Support the promotion of the service through social media, events and the creation of promotional material
* Apply CAB aims, principles and policies when dealing with money advice enquiries.
* To ensure that all work meets quality standards set by Citizens Advice Scotland membership audit conditions and Scottish National Standards for Information & Advice as well as the requirements of the funder

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the Chief Officer or Operations Manager.

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# Person specification

**Knowledge, skills and experience**

**Essential**

* A compassionate, person-centred nature, committed to supporting clients to achieve excellent outcomes
* Experiencing of providing customer service in a face-to-face or telephone-based environment
* Ability to work without supervision and prioritise workload
* Experience of using a range of IT tools to carry out your work, including case management systems, Microsoft Office applications, online applications, internet and email, etc.
* Excellent oral and written communication skills, including the ability to communicate complex information in a clear and accessible manner
* Excellent organisational skills
* A proven ability to work effectively with a wide variety of stakeholders
* A commitment to the aims, principles and policies of Citizens Advice Bureaux
* Ability to operate as a team player and communicate effectively with colleagues and managers
* Ability to travel across Angus where required to meet with clients and/or partner agencies

**Desirable**

* Experience of working with people with multiple and complex needs
* Experience of providing money support to clients in previous roles
* Completion of Citizens Advice Bureaux Adviser Training Programme
* Basic knowledge of multiple enquiry areas to aid with identifying emergencies and making referrals where appropriate

**Additional requirements**

* The post is subject to the disclosure of criminal history information

**The Angus** **Citizens Advice Bureau is committed to equal opportunities both in service provision and employment.**

**Charity number: SC010051**

**Charity name: Angus Citizens Advice Bureau (SCIO)**