



DAGCAS SCQF Level 8	Financial Health Check Coordinator
Reporting To	Operations Manager
Job Function /Location	
Purpose of Job	<ul style="list-style-type: none"> <li>The financial health check coordinator will play a key role in the delivery of an innovative multi-channel financial health check service in the CAB network in Scotland. They will provide operational support for the delivery of the telephone element of the financial health check service. This role will organise the delivery of one of three regional centres who will deliver financial health checks to clients who access the service through a dedicated helpline.</li> </ul>
Competencies	
Scope of Work	<ul style="list-style-type: none"> <li>As detailed in Degree of Autonomy</li> </ul>
Degree of Autonomy	<ul style="list-style-type: none"> <li>Line manage and provide ongoing support for advisers.</li> <li>Provide technical support to advisers.</li> <li>Supervise the operational delivery of the helpline</li> <li>Manage the helpline regional operations and ensure adequate staffing and resources to do so.</li> <li>Work with CAS to ensure requirements of the Service Level Agreement are met</li> <li>Liaise with CAS IT to ensure helpline technical issues are solved</li> <li>Undertake diagnostic interviews with clients by phone or via webchat and check whether individuals are eligible to apply for benefits or to access other income maximisation support.</li> <li>Refer to local CAB for face-to-face support with more complex issues</li> <li>Work with the CAB administrator to ensure efficient service provision</li> <li>Undertake case checks in line with company procedures.</li> <li>Develop and maintain expertise in relevant legislation e.g. welfare rights and benefits</li> <li>Carry out other duties as specified by the Manager and required by the needs of the post</li> </ul>
Processes	<ul style="list-style-type: none"> <li>To maintain accurate statistics for monitoring purposes.</li> <li>To adhere to company principles and uniform standards in case recording.</li> <li>Collate and report statistical information to senior management and the funder at agreed intervals.</li> </ul>
Quality	<ul style="list-style-type: none"> <li>Ensure records are maintained which demonstrate compliance with training and competence requirements</li> </ul>

	<ul style="list-style-type: none"> <li>• Adhere to DAGCAS' recognised good practice and standard processes and procedures to ensure governance and compliance at all times.</li> <li>• Contribute to overall efficiency and quality of processes and procedures.</li> </ul>
Skills	<ul style="list-style-type: none"> <li>• IT Literate.</li> <li>• Customer facing expertise.</li> <li>• Excellent written, oral and communication skills.</li> <li>• Organisational/planning skills.</li> <li>• Person specification requirements are detailed in person specification document.</li> </ul>
Knowledge	<ul style="list-style-type: none"> <li>• Understand aims and principles of policies and procedures and contribute to development and revision of these policies and procedures.</li> <li>• Identify and progress matters of social policy relevant to the remit and within current guidelines and processes.</li> <li>• Have and maintain expertise in relevant legislation in this field of work.</li> </ul>
Personal Development	<ul style="list-style-type: none"> <li>• Identification of personal strengths and weakness, as well as identifying personal training needs.</li> <li>• Attend in-house and external training courses as appropriate</li> <li>• Organise and attend team and staff meetings as required</li> </ul>

## Person Specification

<b>Job Title:</b>	<b>Financial Health Check Coordinator</b>
Knowledge & Understanding	<ul style="list-style-type: none"> <li>• Evidence of experience and/or qualifications at SCQF Level 9</li> <li>• Evidence of Continuous Professional Development.</li> <li>• Evidence of leading and developing a team.</li> <li>• Experience of supporting Senior Management.</li> <li>• Understanding of the need to manage information in a sensitive and appropriate manner.</li> </ul>
Communication, numeracy and ICT skills	<ul style="list-style-type: none"> <li>• Excellent communicator at all levels both within and outwith the organisation.</li> <li>• Excellent interpersonal skills with staff, management, clients and external parties.</li> <li>• Able to relate statutory/legal language in a manner that can be understood by all.</li> <li>• Good level of numeracy and literacy.</li> <li>• Contribute to IT solutions to enable effective and efficient advice.</li> </ul>
Generic cognitive skills, such as evaluation or analysis	<ul style="list-style-type: none"> <li>• Keen analytical skills, able to collate, review and interpret data.</li> <li>• Be able to use data to drive decision making to improve the service delivery.</li> <li>• Ability to identify and resolve problems quickly and efficiently.</li> <li>• Ability to create and manage systems to enable the effective management of the service.</li> </ul>
Autonomy & Accountability	<ul style="list-style-type: none"> <li>• Ability to work on own initiative, prioritise work and manage pressures from both internal and external to the organisation.</li> <li>• Dependable, reliable, trustworthy and approachable.</li> <li>• Leads the service in continuously improving standards.</li> </ul>
Practice: applied knowledge, skills and understanding	<ul style="list-style-type: none"> <li>• Demonstrable ability to provide front line management of a staff team.</li> <li>• Be capable of effective delegation, on-going staff appraisal, and understanding development needs/training.</li> <li>• Know how to ensure quality and performance standards are achieved.</li> <li>• Flexible approach to tasks and a positive attitude.</li> <li>• Support the principle of volunteerism.</li> <li>• Clear understanding of the importance of excellence in service delivery.</li> <li>• Willingness to learn and develop new skills.</li> <li>• Awareness of current policy issues within their field, relating to individuals in Scotland.</li> <li>• Understanding of the issues that affect clients and how it affects individuals and their families.</li> <li>• Working knowledge of existing legislation.</li> <li>• Experience of peer checking or auditing casework.</li> <li>• Experience of training, supporting and supervising staff and volunteers.</li> <li>• Have an understanding of social policy related work and how to apply this in a work environment.</li> <li>• Knowledge of Health and Safety legislation.</li> <li>• Commitment to team working approach.</li> </ul>
Other	<ul style="list-style-type: none"> <li>• Able to travel throughout the region</li> </ul>

Values and attitudes	<ul style="list-style-type: none"><li>• An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of the organisation.</li></ul>