

Money Management Trainer and Caseworker

Context of role

Reporting to the Deputy Manager

Role purpose:

To Provide Financial Literacy Training and Casework Advice Services to Vulnerable Individuals and groups

Project co-ordination

- Lead on the implementation of the bureau's financial capability strategy and project plan.
- Arrange and attend steering group meetings.
- Monitor progress against the project plan on an ongoing basis and provide reports on agreed objectives to the project steering group.
- Collect, collate and present project monitoring and evaluation data.
- Maintain day-to-day financial control of project budget heads, providing updates when required.

Marketing and relationship building

- Devise and implement a communications plan for the project.
- Establish, develop and maintain a range of partnerships to reach 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.

Plan and provide financial capability activities

- Work with learners and partner agencies to identify learners' financial capability needs.
- Devise effective learning activities, including adapting training materials from Citizens Advice Scotland and others.
- Deliver financial capability learning activities (e.g. small group training, one to one mentoring).
- Ensure that learning activities are well organised (e.g. room bookings, equipment and refreshments).
- 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.

Casework

- Provide casework covering the full range of Debt Advice and Income Maximisation.
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
- Negotiate with third parties as appropriate.
- Ensure income maximisation through the take up of appropriate [specialism] benefits.
- Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate.
- Assist clients with other related problems where they are an integral part of their case and refer to other advisers or specialist agencies as appropriate.
- Make home/outreach visits as necessary.
- Provide advice and assistance to other staff across the whole range of money advice issues.
- Ensure that all casework conforms to the Level 3 of Scottish National Standards for Information and Advice Providers.
- Maintain case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation.
- Ensure that all work conforms to the bureau's systems and procedures.

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.
- Keep up to date with legislation, case law, policies and procedures relating to Money advice 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/management team meetings as appropriate.
- Assist with Service initiatives for the improvement of services.

Other duties and responsibilities

- Uphold the aims and principles of the CAB service and its equal opportunities policies.
- 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.

- Participate fully in the life of the bureau, attending workers' meetings, internal planning events etc. as agreed with line manager.
- Support other bureau work as required (e.g. providing referrals for advice appointments where appropriate).
- 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.

Person specification

- Ability to manage a complex project - including monitoring 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.
- Ability to market a new project.
- Experience of establishing and developing partnerships with other agencies and joint working.
- Understanding of theory and principles of adult learning and development.
- Ability / experience of planning and developing learning activities.
- Ability to sensitively empower and engage with adults who have had poor experiences of formal education.
- A basic knowledge of the personal finance issues that affect adults at risk of financial exclusion.
- Ability to recruit, induct, train and supervise a small team of volunteers and / or staff.
- 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.
- Ability to use IT applications to record statistics, produce documents and training materials and keep accurate project records.
- Current knowledge and experience of Money and Debt Advice.
- Effective oral communication skills with particular emphasis on negotiating and representing.
- Effective writing skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence.
- Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
- Understand the issues involved in interviewing clients.

- Numerate to the level required in the tasks.
- Ability to prioritise own work, meet deadlines and manage caseload.
- Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
- Demonstrate understanding of social trends and their implications for clients and service provision.