



JOB DESCRIPTION - Referrals Officer

Employer:	East Ayrshire Citizens Advice Bureau
Job Title:	Part Time Referrals Officer
Hours :	20 hours per week (mon-fri)
Salary:	£20,000 per annum FTE (pro rata hours) Temporary contract funding until March 2019
Base Location:	Kilmarnock bureau
Responsible to:	Kilmarnock Operations Manager

Summary of Job Remit

To provide a single point of contact for the receipt and dissemination of referrals from partner organisations throughout Ayrshire. Ensuring that all referrals are dealt with within specific timescales and clients and stakeholders (including colleague workers) are given the highest level of customer service achievable.

Main Responsibilities

- Receive all email referrals into the bureau via the bureau's dedicated email address/s.
- To ensure that all email referrals into the bureau are logged onto the CASTLE system and referrals excel spreadsheet before allocating to the relevant bureau worker through CASTLE.
- Monitor referring organisations on a monthly basis. Where referrals numbers fall to inform the Manager.
- In liaison with project workers identify other referral streams aiming to maximise the referral streams
- Provide quarterly reports on volumes of referrals received to the Manager and identify advice trends and client profiles
- Identify referrers where their referrals have a consistent rate of non-engagement and seek to remedy the situation for future referrals
- Identify and schedule in appropriate interview times with the relevant adviser through consultation with the relevant bureau adviser

- Where a referral client fails to attend their scheduled appointment and the necessary permissions have been met under GDPR send a missed appointment letter offering them another opportunity to engage with Bureau.
- Schedule and Log appointments/interview times in the office electronic diary system as outlined in the Bureau Policies and Procedures guides.
- Survey Partner organisations on an annual basis (or where requested) to ensure that referral requirements are being met and that service standards are of a high standard.
- In conjunction with the Manager ensure that all data sharing agreements are signed off so that the bureau referral system is GDPR compliant.
- Where necessary lead on the consultation to implement any amendments to the referral forms used by the EACAB team.

Other Duties and Responsibilities

- To be considerate of and respectful to colleagues and client's needs and limitations and act in a supportive manner as outlined the CAB aims and principles.
- Ensure that professional attitudes and behaviours are demonstrated at all times with all EACAB stakeholders
- To work co-operatively with other agencies and community groups within East Ayrshire (and wider where necessity dictates) to improve the provision, standard and accessibility of advice.
- To consider the impact of actions on the rest of the business
- To abide by the health and safety guidelines of the bureau and share responsibility for own safety and that of others
- Keep updated with, work within and contribute to the ongoing enhancement of bureau systems, policies and procedures
- To contribute to the identification of own training and development needs
- To attend and actively participate in staff/team meetings as required
- To check, read and where necessary respond to email on a daily basis ensuring that all deadlines are met
- To undertake any other duties and responsibilities which may reasonably be determined by the Manager/Operations Manager

