* **Job Title:** Financial Inclusion Outreach Worker
* **Project:** **Be More Squirrel**
* **Responsible to:**  Kate Hughes

# About the role

Funded by Illegal Money Lending Prevention team at Trading Standards, this 1 year post provides an exciting opportunity to provide information, advice and education around budgeting, financial planning and financial products.

This project is a Falkirk wide initiative in conjunction with Falkirk and Grangemouth and Bo’ness CABs. The project worker will be out in the community running financial games sessions in primary and secondary schools, workshops for parents and young adults and running additional advice outreach in locations throughout the Falkirk area including Grangemouth and Bo’Ness, Denny, Bonnybridge, Larbert and Central Falkirk to assist the local community to understand and help to access the alternatives to illegal money lending, especially in areas of increased risk due to financial insecurity.

# Job description

**Key responsibilities**

* To run one-off financial education workshops in schools using an educational game and associated worksheets
* To run information sessions to groups in the community including parent groups and community service users
* To conduct face-to-face outreach appointments, using sensitive listening and questioning skills to allow clients to explain their problem(s) and empower them to set their own priorities
* To provide general advice on topics including benefits, single debts, budgeting, housing and employment and to support referrals to specialists when required
* To liaise where appropriate with bureau staff and other relevant agencies as appropriate
* To assist with expanding the project by liaising with potential workshop groups and carrying out research within the community
* To record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
* To participate in external evaluation of the project at various stages throughout the funding period
* To ensure that all work meets quality standards and the requirements of the funder
* To keep abreast of the latest developments relating to financial inclusion

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the bureau manager.

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# Person specification

**Knowledge, skills and experience**

**Essential**

* A sound working knowledge of basic debt advice, welfare benefits, basic financial products and budgeting techniques
* Experience providing information in a group setting
* Experience of working with people with multiple and complex needs
* 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

**Desirable**

* Completion of Citizens Advice Bureaux Adviser Training Programme
* Experience of working in an outreach or multi-office setting
* Experience of working with volunteers
* Experience working with groups of young people
* Experience providing workshops or training to adults

**Additional requirements**

* The post is subject to the receipt of PVG disclosure record for regulated work with vulnerable adults and/or children.
* Access to a car and a clean driving licence due to the travel required in the role.