* **Job Title:** Money Advice Officer
* **Responsible to:** Service Manager
* **Responsible for:** Operation of Bureau Money Advice Services

# Job description

# Summary of Main Responsibilities

* To ensure that the Money Advice Service in Falkirk CAB operates professionally and efficiently, complying with CAS audit, Nationals Standards and DAS requirements, while at the same time serving the needs of the clientele.

**General Management Responsibilities**

* To operate an efficient and effective Money Advice Service within Falkirk Citizens Advice Bureau
* To provide advice, guidance and support to individuals on matters relating to debt issues and identify appropriate options.
* To set up and maintain systems/procedure to enable the smooth running of the bureau money advice service.
* To maintain level of bureau money advice caseload.
* To train and support specialist volunteer money advisers.
* To offer training and on-going support to general advice workers in order to potentially recruit future specialist money advisers.
* To ensure that the bureau is capable, both numerically and qualitatively, of meeting the needs of clients registering for money/debt advice.
* To keep up to date with relevant current legislation and identify any changes that may impact on client or the service.
* To maintain accurate records of all advice and money advice unit casework to CAS audit, National Standards and DAS Accreditation standards.
* To maintain and provide appropriate statistical and progress reports as required.
* To represent and promote Falkirk CAB at appropriate forums.
* To identify areas of concern and contribute to social policy matters.
* To advise and update Service Manager regularly regarding operation of money advice service.
* To honour the aims and principles of the CAB service.
* Working co-operatively with Money Advisers in other CABx and other agencies within the local authority area, in the production of reports and strategies to improve the provision of money advice.

#### **Recruitment**

* Recruit, train and support pool of volunteer money advice team

**Training**

* Assist the Volunteer Co-ordinator in meeting the training needs of volunteer advisers.
* To develop promotional materials for potential users of the service
* To give talks/presentations to outside agencies/groups.
* To attend meetings and training identified by Service Manager/CEO.
* Ensure all personal training/development is kept up to date to meet requirements of job - Complete CPD training – 20 hours annually

**Advice Work**

* Conduct advice giving interviews with clients
* Providing all money advice options to clients including DAS and applications for Sequestration.
* Progress casework to completion – undertake research of case issues when required
* Provide support and supervision for the voluntary staff and be available for specialist advisers requiring assistance

**Administration**

* Ensure all cases are recorded fully and accurately, including client financial gains in CASTLE in accordance with bureau procedures and Quality Assurance/National Standards
* Assist in the production of briefing materials, social policy reports and information leaflets
* Undertake other administrative tasks when delegated by the Bureau Manager
* To work within the aims and the values of the CAB service.
* To abide by health and safety guidelines and share responsibility for own safety and that of colleagues and clients.
* To undertake such duties from time to time that may fall outside of the above. For example, out of hours engagements such as delivering a talk to local groups.

**Quality Assurance**

* To work with bureau manager and other staff to assist in the development of Quality Assurance within the Bureau and comply with Quality Assurance /National Standards policies
* Carry out case checking to Quality Assurance/National Standards.

**Other**

* To work within the aims and the values of the CAB service.
* To abide by health and safety guidelines and share responsibility for own safety and that of colleagues and clients.
* To undertake duties from time to time that may fall outside of the above. For example, out of hours engagements such as delivering a talk to local groups

#### To carry out any other reasonable task as requested by the CEO/Service Manager or Board of Directors

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# Person specification

**Knowledge, skills and experience**

**Essential**

* A good standard of general education.
* Recent money advice or debt counselling experience.
* Experience in money advice casework and case management.
* Ability to work without close supervision, prioritise own work and meet deadlines.
* Ability to work as part of a team.
* Ability to communicate effectively, both orally and in writing.
* Understanding of the main principles and methods of statistical gathering and service evaluation.
* Ability to work hours flexibly as required by the needs of the service.
* A sound working knowledge of social security benefits and the legal rights of debtors and creditors.
* A knowledge of money advice strategies
* A working knowledge of Microsoft software and related packages
* Operational knowledge of case management systems.
* An understanding of and commitment to the aims, principles and policies of the Citizens Advice Bureau service.
* Commitment to team working.
* Commitment to equal opportunities policies.
* A willingness to undertake training identified in collaboration with the Service Manager/CEO
* A commitment to a client-driven, volunteer-led service and a “can do” attitude.
* Ability to work professionally and sensitively with all clients, volunteers, staff and key stakeholders.

**Desirable**

* Completion of Citizens Advice Bureaux Adviser Training Programme or similar or working towards completion.
* Experience in the preparation and presentation of training courses.
* Experience of preparing reports, plans and proposals.
* Advice audit experience
* Volunteer development
* Knowledge of advice quality and audit processes

**Additional requirements**

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

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

**Charity number: SC148330, Charity name: Falkirk Citizens Advice Bureau Ltd.**