### **CLYDESDALE CITIZENS ADVICE BUREAU**

**South Lanarkshire CAB Debt Helpline Project**

**MONEY ADVICE CO-ORDINATOR**

Name of Employer: Clydesdale Citizens Advice Bureau

Job Title: Money Advice Coordinator

Responsible to: Manager

Hours: 17.5 hours per week

Salary: £18,200 (pro rata)

Type of Contract: Fixed term until 31st March 2023

**Summary of role**

The South Lanarkshire Citizens Advice Bureaux (CAB) Debt Helpline Project aims to improve access to and the efficiency of debt advice services provided by the CAB service for people in South Lanarkshire. It provides a multi-channel service via phone, webchat, email and face-to-face, giving people choice of access. The project will help inform how debt advice will be delivered in the future throughout Scotland. Key to success is the smooth transfer of clients from phone to face-to-face services when needed. The Money Advice Coordinator supports clients and Bureau Debt Advisers to help ensure the efficiency and effectiveness of the service.

**Main responsibilities**

To provide detailed administrative and organisational support to the Debt Adviser, managing appointments, assisting clients with preparation for advice sessions and supporting the evaluation of the service.

#### General Responsibilities

* Maintaining appointment system for Debt advice
* Ensuring clients are reminded of appointments to reduce ‘no shows’
* Supporting clients to complete any paperwork in advance of appointments as advised by the Debt Adviser
* Providing support to the Debt Adviser with file management, case recording, statistics and reporting
* Producing standard letters and other paperwork as requested by the Debt Adviser
* Providing support to Debt Adviser with creditor liaison
* Follow-up with clients to record outcomes of advice and their level of satisfaction with the service
* Attending team and staff meetings as required
* Working within the money advice team, helping to support client referrals
* Carrying out other duties as specified by the manager and required by the needs of the post

Person specification

Essential for appointment and holding of the post

* Friendly and approachable manner and ability to support and show respect for all clients, regardless of their circumstances or reasons for seeking advice.
* Agreement to observe the strictest level of confidentiality on all matters relating to clients.
* Ability to manage workload to accommodate variation in demand for service and in resources available.
* Sufficient arithmetical skills to be able to produce financial statements, etc.
* Excellent administrative and organisational skills and a demonstrated ability to work within systems and to follow procedures.
* Ability to communicate skilfully in conversation, by telephone and in writing with clients and in acting on behalf of clients.
* Commitment to work in partnership with our Debt advisers, specialist advisers and other colleagues in the efficient and effective delivery of our specialist services.
* Commitment to teamwork and able to foster it and contribute to it.
* Commitment to increase personal knowledge and skills through undertaking training.
* Ability to use computers and computer-based information systems in support of the role and the work of the Bureau.
* Ability to develop skills and knowledge of self and colleagues in support of the project

Highly Desirable

* A knowledge of debt and benefits issues
* An understanding of advice work
* Experience of working with volunteers
* Experience of providing a service to clients

Other

* A willingness to undertake training identified in collaboration with the Bureau Manager