**Dundee Citizens Advice Bureau**

**Recruitment Pack**

1. Covering Letter
2. Background Information
3. Job Description
4. Person Specification
5. Notes on completing application
6. Application form
7. Equal opportunities monitoring form

Date: **19TH December 2018**

Dear Applicant

**FINANCIAL SUPPORT OFFICER**

Thank you for your enquiry about the above post.

You will find enclosed an application form, equal opportunities monitoring form and some background information about the bureau.

In determining which applicants will be interviewed the Interview Panel will have regard to applicants who best fit the person specification so it is important that you to use this as a guide when completing the application form.

We regret that we are unable to acknowledge receipt of completed application forms unless a stamped addressed envelope is enclosed with your application.

We look forward to receiving your application by the closing date is **11th January 2019** and we would ask that you provide a telephone number where we can contact you day and/or evening. If you are selected for interview, these will be held on the **17th January 2019**.

Yours sincerely

Tracy McNally

Director

**DUNDEE CITIZENS ADVICE BUREAU**

**Information to applicants**

Citizens Advice Bureaux are the major providers of holistic information, advice and assistance, operating from 205 service points that cover Scotland from the islands to the City Centres.

The Bureaux are staffed by trained volunteer advisers under the supervision of the manager, and provide responses to clients' enquiries covering the whole range of social issues. Despite being a generalist service, most enquiries are concerned with matters related to problems of poverty and deprivation.

These local offices are wholly independent and receive funding from their respective local Councils in the form of annual grants. Bureaux are autonomous bodies under the control of a local Board of Directors. These consist of representatives of local statutory and voluntary agencies, elected members of the public, and staff representatives.

All bureaux are members of Citizens Advice Scotland (the Scottish Association of CABx), and as such must meet specific conditions of membership related to standards of service and other matters. The Association receives financial support from central government through the Department of Trade and Industry.

Enquiries are across a wide range of fields, and clients expect high quality advice and assistance (including representation at tribunals and in Court when appropriate) on what are, at times, highly complex matters. The main enquiries at the present time relate to problems with welfare benefits and money; employment; goods and services; housing; and family and personal situations.

Applicants for the post should be under no illusions about the extent of hard work and pressure involved in this challenging, interesting and rewarding job. All CAB posts demand a high level of commitment and will involve a flexible approach to working. No overtime payments are made, but time off in lieu is given. Expenses are reimbursed for travel related to approved duties.

**Job Description**

**Employer:** Dundee Citizens Advice Bureau

**Job Title:** Financial Support Officer

**Main Purpose:**

1. Support Dundee Money Action participants in relation to money management skills, debt and financial resilience. Help participants to understand their options and choices.
2. Work to improve participants’ money management skills and social inclusion by way of one to one intensive holistic support. Gather details of participants’ main concerns, needs and aspirations by utilising the Holistic Needs Assessment tool and Financial Capability Action Plan.

**Responsible to:** Director

**Hours of Work:** 35 hours per week

**Contract:** Fixed Term to February 2020

**Salary Scale**: £21,353 - £23,429 per annum

**Post Funded by:-** Big Lottery and the European Social Fund

**MAIN DUTIES**

|  |
| --- |
| 1. Investigate and implement initiatives within Dundee Money Action Local Community hubs to support the Dundee Money Action programme. 2. Advise individuals of money management, debt and fuel poverty options and identify the various supports and activities available under the Dundee Money Action programme. 3. To work to improve participants’ money management skills and social inclusion by way of one to one intensive holistic support. Gather details of participants’ main concerns, needs and aspirations by utilising the Holistic Needs Assessment tool and Financial Capability Action Plan. 4. To monitor client progress in terms of participants’ individualised personal action plans as well as outputs, referrals and feedback from partner agencies. Gather outcomes and key performance indicator information in line with Dundee Money Action programme requirements. 5. To work with external partners and agencies to develop options for Dundee Money Action participants, ensuring they are able to make appropriate decisions based on their individual circumstances. 6. To work closely with Council Departments and external Voluntary Agencies ensuring appropriate referrals are made to support individuals, remove debt and maximise income for participants. 7. To provide practical assistance by helping residents where necessary to complete welfare benefit applications and deal with correspondence. 8. To provide members of the public with advice and assistance on money management, benefit entitlement, better off calculations, digital inclusion, welfare benefits, debt advice, costs of running a home, budgeting and identify potential savings with regards to fuel and refer participants to more specialised agencies when appropriate. To complete claim forms where appropriate on behalf of participants to increase client income. 9. To provide advocacy support to participants where required 10. To build a meaningful relationship with communities, external agencies and refer participants to agencies for additional support 11. To attend hub venues, food banks, drop in sessions throughout the community and complete Holistic Needs assessments as required. 12. To identify candidates willing and capable of undertaking Peer Mentoring roles within the Dundee Money Action programme.   13. To follow up and record all outcomes and maintain accurate database records of all activity. To compile and produce monthly performance indicators,  14. To work closely with colleagues to achieve Big Lottery Fund targets.  15. To provide exemplary standards of customer service, working with communities to deliver real solutions and improve quality of life.  16.To liaise on a regular basis with both external and internal partners: participating in effective team work and establish good channels of communication with local organisations.  17.The post holder(s) will be solely involved in European Social Fund activities (i.e. spend 100% of their contracted hours on the ESF project only and undertake no other non-ESF project related duties).  18. Self-Management   * Take responsibility for implementing policies, procedures and protocols of the organisation. * Take responsibility for personal safety in and out of the office in accordance with the organisation's Safety Procedure. * Participate in the support, supervision and appraisal process. * Provide written reports on project progress and for other publications.   19. Team work   * Share relevant information and give support and encouragement to colleagues. * Participate in team meetings and Annual General Meeting. * Assist in the development of the organisation by participating in development days, task groups etc. when required.   20. Personal Development   * Keep up to date knowledge of Legislation, Policies and case law relevant to post * Identify own learning needs and participate in identified learning opportunities when required. * Feedback on learning opportunities. * Assist with delivery of training when required.   21. Promoting the service   * Present a positive image of the Bureau at all times. * Form effective working relations and networking with other organisations and stakeholders ensuring collaborative approach in service delivery. * Assist in raising awareness of the service. |

**PERSON SPECIFICATION**

|  |  |
| --- | --- |
| POST TITLE: | Financial Support Officer – Dundee Money Action |

|  |  |  |  |
| --- | --- | --- | --- |
|  | ESSENTIAL REQUIRMENTS | DESIRABLE REQUIREMENTS | METHOD OF ASSESSMENT |
| PROFESSIONAL/  EDUCATIONAL  QUALIFICATIONS | 5 Standard Grades, or equivalent at level 3 or above, including  Maths and English, or relevant work experience. | HNC/HND or equivalent in a related subject | Application |
| RELEVANT WORK/OTHER EXPERIENCE | Experience of delivering a customer focused service.  Understanding of Money Management and/or Debt Management.  Proven experience of face to face work with clients in a welfare, social work or debt management advice environment  Ability to use IT in the provision and recording of advice – i.e. basic word processing and knowledge of spreadsheets  Ability to work and understand concerns of vulnerable people. | An understanding of current Benefit Legislation. | Application  Application  Interview  Reference  Application  Interview  Application  Interview  Reference  Application  Reference |
| PARTICULAR SKILLS/ABILITIES | Effective written and oral communication skills.  Ability to demonstrate a proactive approach to problem solving and decision making  Ability to use interpersonal skills to approach individuals who find it difficult to engage.  Ability to take responsibility for own workload, complete tasks without supervision and manage time effectively.  Awareness of the social needs of local communities and services provided by the voluntary sector | Ability to communicate effectively with a range of stakeholders (e.g. Council Departments and outside agencies) | Application  Interview  Reference  Application  Interview  Application  Interview  Application  Interview  Application  Interview |
| PERSONAL QUALITIES | Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.  Ability to support and encourage vulnerable individuals.  Ability and willingness to work as part of a team.  Ability to monitor and maintain own standards.  Demonstrate understanding of social trends and their implications for clients and service provision.  Understanding of and commitment to the aims and principles of the CAB service and its equal opportunities policies.  Commitment to voluntarism  Commitment to quality customer care | Proven ability to work within a community development or volunteer setting.  Experience of implementing equal opportunities policies and practices. | Application  Interview  References  Application  Interview  References  Application  Interview  References |
| ANY ADDITIONAL JOB RELATED REQUIREMENTS | Ability to work evening and weekends if required.  Basic Disclosure Scotland Check |  | Application Form Interview |

**Notes for applicants on completing the application form**

* The form should be completed in black ink or black ballpoint pen or typed. This will make it easier for photocopying purposes.
* Please do not send in your CV. Where you provide a CV, it will not be considered by us and in the absence of a completed application your application will not be continued.
* One of your referees should be your present or most recent employer. If you have not been employed or have been out of employment for a long time, please give the name of someone who knows you sufficiently well to confirm the information you have given and to comment on your ability to do the job. This should not be a relative or purely personal friend.
* The enclosed person specification lists the minimum requirements for this post. When short listing for interview the selection panel will only consider the information contained in your application form and will assess this against the person specification.
* The selection panel cannot make assumptions about the nature of the work you have done or your experience from a list of job titles. It is therefore important that you use the space provided to demonstrate how you meet the requirements. Paid and voluntary work are not the only experiences worth quoting. Other life experiences and skills may be just as valid.
* If you are shortlisted for interview, the selection panel will ask you questions based on the person specification, which will cover the areas in more detail.

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***Strictly Private and Confidential***

# APPLICATION FOR EMPLOYMENT

**Dundee Citizens Advice Bureau**

**Central Library, Level 4**

**Wellgate Centre**

**Dundee**

**DD1 1DB**

**Telephone: 01382 431587**

**Please this form in black ink or type to enable clear photocopying. Please call 01382 431587 to request an email version**

Dundee Citizens Advice Bureau wishes to ensure that comparison between applicants for posts is thorough and in line with it Equal Opportunities Policy. It is, therefore, essential that you complete this application form fully as it will be used to assess whether you will be shortlisted for interview. **Please do not enclose curriculum vitae**.

### 1. Position Applied for

**2. Surname First Names**

**3. Address**

**4. Telephone Number**

### 5. How much notice, if applicable, are you required to give?

**6. Shortlisted applicants will be invited to attend interview 17th January 2019**

**Please supply contact number and /or an e-mail address**

**7. Do you hold a clean current driving licence?** **Yes No**

### 8. Please state where you saw the advert for this post

#### If you require access assistance please phone (01382 431587)

**9. Are you entitled to work in the United Kingdom? Yes No**

*Please note, if you are called to an interview you will be asked to produce supporting evidence.*

**10. Work Experience**

##### We want to know about your work experience, paid or unpaid. Please include your current /previous employment, voluntary work, or community activities, and time spent caring for dependants, etc, if appropriate. Say why you left.

|  |  |  |  |
| --- | --- | --- | --- |
| Dates | Names of Employer(s)/Organisations | Main Tasks Undertaken | Why did you leave? |
|  |  |  |  |

**12. Education and Training**

##### Please list any education and/or training (including short courses) that you have undertaken

|  |  |  |
| --- | --- | --- |
| Dates | **Education/Courses/Training** | **Qualifications** |
|  |  |  |

**13. Additional Information**

In this section we would like you to give your reasons for applying for this post. Bearing in mind the job description and person specification, please indicate what experience, skills and interests you would bring to this job. **(Please continue on an additional sheet if you wish)**

### 14. References

Dundee Citizens Advice Bureau requires to receive positive references prior to confirming appointment of the successful candidate.

Please give below the names and addresses of two referees who can comment on your suitability for the post. If you have been employed, one should be from your present or most recent employer.

Name

Relationship

Position held

Address

Telephone No

Name

Relationship

Position held

Address

Telephone No

* **References will only be taken up where the bureau intends to make an offer of employment**

**I declare the information given on this form is correct to the best of my knowledge. I understand that my application may be rejected and/or I may be dismissed following appointment if I have given any false or misleading information or have withheld any relevant details.**

**Signature ………………………………………… Date ……………………………………**

**Closing Date for application: 11th January 2019**

Please return this form marked “Confidential” to:-

Tracy McNally

Director

Dundee Citizens Advice Bureau

Central Library

Level 4, Wellgate Centre

Dundee

DD1 1DB

or e-mail tracy.mcnally@dundeecab.casonline.org.uk

### Date of interviews for successful applicants: 17th January 2019

**YOU ARE REQUESTED TO BRING TO INTERVIEW ALL RELEVANT EDUCATION/VOCATIONAL CERTIFICATES YOU HAVE REFERRED TO IN THIS APPLICATION**

**GDPR**

The personal record of the person appointed to this post will be held in Dundee Citizens Advice Bureau in accordance with the Data Protection Act. The personal records of unsuccessful candidates will be destroyed as confidential waste six months after the fixed interview date or deferred date.

## EQUAL OPPORTUNITIES – RECRUITMENT MONITORING FORM

The CAB is striving to ensure equality of opportunity in its volunteering and employment policies and therefore we have decided to monitor our recruitment practices. This will help us identify areas of under representation in our workforce and to assess those areas where positive action is needed. In order that we can monitor each stage of the recruitment process, you will be asked to complete this form on application.

Your co-operation in completing this form would be greatly appreciated. We must stress that any information you give will be strictly confidential. You are not obliged to answer the questions but you will appreciate that, for our monitoring policy to be wholly effective, we would hope to have 100% response.

If you do not wish to answer any question(s), this will not affect your application in any way. There follows an explanation of some of the sections where appropriate. Thank you for your time and co-operation in completing our form.

We wish to give you the following assurances

* The information provided will not form the basis of any part of selection
* All information will be regarded as confidential
* This information will only be used for statistical purposes to monitor the composition of the service.

**1. ETHNIC ORIGIN**

We appreciate that some people, including those of mixed race, may not be happy with classification used on monitoring forms. The classifications we have used are those used by the General Register for Scotland – census forms. If you wish to classify yourself in some other way, please use the additional space provided to do so.

I would describe my ethnic origin as *(in your own words or if you prefer tick one of the following):*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| White Scottish |  | Indian |  | Chinese |  |
| Other White British |  | Pakistani |  | Caribbean |  |
| Irish |  | Bangladeshi |  | African |  |
| Any other white background |  | Any other Asian background |  | Any other Black background |  |

Other ethnic background (please specify)……………………………….

**2. GENDER**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| I am *(please tick):* | Male |  | Female |  | Transgender |  |

**3. AGE**

|  |  |  |  |
| --- | --- | --- | --- |
| 25 and under |  | 55 and over |  |
| 26 - 34 |  | Declined to answer |  |
| 35 - 54 |  |  |  |

**4. DISABILITY**

We understand that many employees do not declare disability or caring responsibilities because of possible discrimination against them by employers in the selection process and many people do not register as disabled for the same reason. We would like to know how many people we attract to the service so that we can monitor the effectiveness of our policies towards disabled people and their carers.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Disability\* | Yes |  | No |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Registered disabled\* | Yes |  | No |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Would you require special adaptations/equipment | Yes |  | No |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Carer of someone with a disability | Yes |  | No |  |

Please specify\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*If you answer in the affirmative to any of the above questions and are short-listed for interview, please contact the CAB to ensure that interview arrangements are to your satisfaction.

**5. SEXUAL ORIENTATION**

We appreciate that some people may find the question on sexual orientation to be an extremely personal one and we must therefore re-iterate that you are under no obligation to answer it.

I would describe myself as *(please tick):*

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Heterosexual |  | Lesbian |  | Gay |  | Bisexual |  | |  | | --- | |  |   Transgender |

**6. MEDIA RESPONSE**

Where did you see this post advertised or how did you find out about it?

|  |
| --- |
|  |

**7. COMMENTS**

Do you have any comments about our monitoring form?

|  |
| --- |
|  |