

## **FALKIRK CITIZENS ADVICE BUREAU**

### **FINANCIAL HEALTH CHECK SUPERVISOR: JOB DESCRIPTION**

Job Title: Financial Health Check Supervisor

Hours: 35 hours per week

Type of contract: Fixed term until March 2019 with possible extension (depending on funding)

Salary: circa £24,500

Closing date: 2 October 2018

#### **Summary of role**

The new Financial Health Check project aims to improve access to and the efficiency of financial health checks for vulnerable families and older people.

The Financial Health Check Supervisor will play a key role in the delivery of an innovative multi-channel financial health check service in the CAB network in Scotland. They will provide operational support for the delivery of the telephone element of the financial health check service. This role will organise the delivery of one of three regional centres who will deliver financial health checks to clients who access the service through a dedicated helpline.

#### **Main responsibilities**

The Financial Health Check Supervisor supports the regional delivery centre to provide the most effective service to suit the needs of the client. They ensure the regional telephony service provides a holistic diagnosis of the client's problems, helping to support the client to maximise their income and identifying whether the client is able to self-help. The supervisor will make use of on-site support from the CAB management and technical support from CAS IT to ensure that the service runs smoothly and co-ordinates with the other regional centres.

They organise the delivery of the service and refer on to their manager for emergencies, to an appropriate local CAB for a face-to-face appointment in a local bureau or other appropriate agency.

#### **General Responsibilities**

- Supervising the operational running of the helpline
- Manage the helpline regional operations and ensure adequate staffing and resources to do so.
- Work with CAS to ensure requirements of the Service Level Agreement are met
- Provide an appropriate level of support and supervision to supervised staff
- Staff management as required
- Participate in the induction of new staff as delegated.

- Ensure the effective performance management and development of staff through regular supervision sessions, the appraisal process and learning and development.
- Liaise with CAS IT to ensure helpline technical issues are solved
- Ensure issues are identified and acted on to develop individuals, improve the quality of advice, and ensure clients do not suffer detriment due to poor or inadequate advice  
Provide technical support to advisers and/or caseworkers.
- Undertake diagnostic interviews with clients by phone or via webchat and diagnosing whether individuals are eligible to apply for benefits or to access other income maximisation support, where required.
- Referring to manager for help with emergencies
- Referring to local CAB for face-to-face support with more complex issues
- Working with the CAB administration to ensure efficient service provision
- Supervising and monitoring case records including detailed statistics
- Maintaining expertise in relevant legislation e.g. welfare rights and benefits
- Providing information for project reports
- Create a positive working environment in which equality and diversity are well-managed, dignity at work is upheld and staff can do their best.
- Organising team and staff meetings as required
- Carrying out other duties as specified by the Manager and required by the needs of the post

### **FINANCIAL HEALTH CHECK SUPERVISOR - PERSON SPECIFICATION**

<b>FINANCIAL HEALTH CHECK SUPERVISOR</b>	<b>COMPETENCIES</b>
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"> <li>• Completion of accredited training to advice level (or evidence of competence through CAB ATP completion, relevant CPAG courses or Giving Good Debt Advice)</li> </ul>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"> <li>• Telephone advice</li> <li>• Recent advice experience, welfare rights or debt counselling</li> <li>• Familiarity with electronic case management systems</li> <li>• Staff or volunteer support and supervision</li> <li>• Advice session support and supervision</li> </ul>
<b>SKILLS AND ATTRIBUTES</b>	<ul style="list-style-type: none"> <li>• Ability to organise effectively</li> <li>• Ability to work without close supervision, prioritise own work and meet deadlines</li> <li>• Ability to work as part of a team</li> <li>• Ability to support and supervise other members of the team</li> </ul>

	<ul style="list-style-type: none"> <li>• Ability to communicate effectively, both orally and in writing</li> <li>• Ability to work hours flexibly as required by the needs of the service</li> </ul>
<b>KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>• A sound working knowledge of social security benefits and entitlement</li> <li>• A knowledge of income maximisation strategies</li> <li>• A working knowledge of Microsoft software and related packages</li> <li>• An understanding of and commitment to aims, principles and policies of the service</li> </ul>
<b>OTHER</b>	<ul style="list-style-type: none"> <li>• A willingness to undertake training identified in collaboration with the Bureau Manager</li> </ul>

If you have any questions please contact

*Office Manager, Falkirk Citizens Advice Bureau, 3 Meeks Road, Falkirk FK2 7EW*  
*Email: [bureau@falkirkcab.casonline.org.uk](mailto:bureau@falkirkcab.casonline.org.uk) Telephone 01324 617899*