

**Financial Capability Adviser - Non Client Facing Job Description and Person Specification**

**About the role:**

My Great Start Adviser – this service focuses on supporting tenants at the earliest possible opportunity to ensure they have knowledge and skills to develop positive payment culture behaviours and responsibilities, whilst at the same time improving their own financial wellbeing. Please see the service specification attached.

**Main responsibilities**

In co-operation with other agencies, to identify the need for and provide advice over the phone/video call etc.

**Advice giving**

* Interview clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities.
* Use the Citizens Advice Information System to find, interpret and communicate the relevant information.
* Research and explore options and implications so that clients can make informed decisions.
* Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
* Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
* Refer internally or to other specialist agencies as appropriate.
* Ensure that all work conforms to the bureau's Office Manual and Quality Standards at the appropriate level.
* Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

**Social policy**

* Assist with social policy work by providing information about clients' circumstances through the appropriate channel.
* Alert clients to social policy options.

**Professional development**

* Keep up to date with legislation, policies and procedures and undertake appropriate training.
* Read relevant publications.
* Attend relevant internal and external meetings as agreed with the line manager.
* Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate. **Administration**
* Use IT for statistical recording, record keeping and document production.
* Ensure that all work conforms to the bureau's systems and procedures.
* Provide statistical information on the number of clients and nature of cases.

**Other duties and responsibilities**

* Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
* To share evening and weekend operational hours on a rotational basis with other paid staff.
* Demonstrate commitment to the aims and policies of the CAB service.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
* Ensure accurate information and advice is given, by monitoring client records and through case checking
* Any other reasonable tasks as requested by the Bureau Manager

**Person specification**

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|  | **ESSENTIAL** | **DESIRABLE** |
| **Experience** | * A minimum of at least 1 year experience in working in the CAB service. * Experience in giving advice on a range of subjects to members of the public covering Money, Housing, Social Security, Employment and Legal advice. * A working knowledge of the procedures of the citizens advice | * Writing formal letters and preparing reports, plans and proposals * Specialist experience in core CAB advice subjects * Certificate of Money advice Service Quality framework(GGDA) to minimum of Advice level or equivalent |
| **Skills and attributes** | * Ability to communicate and establish good relationships with a range of people * Ability to work without close supervision, prioritise own work and meet deadlines * Ability to deal with difficult situations in a calm, effective non-confrontational manner * Ability to communicate effectively, both orally and in writing * Ability to network with other groups within the community * Ability to gather and accurately record statistics * Excellent organisational skills * Ability to work under pressure | * Ability to work as part of a team and on own initiative * Understanding of the needs of people who may be vulnerable, distressed or under stress * Ability to produce statistical and written reports to funders * Ability to look at the development of services and implement improvements with minimal input |
| **Knowledge** | * An understanding of Castle case recording systems and procedures * An understanding of the needs of the funders relating to clients, client profiles, recording of cases and financial gain. | * Knowledge of local voluntary organisations |
| **Values and attitudes** | * An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of the Bureau. | * An understanding of the need for partnership working and a proactive approach to same. |
| **Other** | * A willingness to identify and undertake relevant training |  |