



Money Mentor or trainee

Salary: £24,545 - £25,463 pro rata, based on 37 hour working week, £21,000 –£23,545 pro rata for training post.

Benefits: up to 5% matched contribution pension, 28 days' holiday plus bank holidays pro rata

Hours: 14 - 21 hours per week

Location: 95 St Aldates OX1 1DA, with travel across city

Duration: Fixed term 12-month contract with possibility of extension

Role purpose

To support clients who have difficulty managing their money and/or are not realising their financial goals to improve their money management skills and embed good money management practices into their lives to secure their financial future and reduce the need for external support.

The post holder will be expected to build on existing best practice working motivationally to ensure improved financial capability for a wide range of clients and empower a small group of volunteers to deliver financial capability to more effectively meet rising demand.

Full training is available for anyone applying for the post as a trainee.

Context of role

Our service is seeing an 11% year on year increase in debt issues with increases in both the value and complexity of debts. Personal debt is rising and expected to rise by 193% by 2022. If this trend continues we will not be able to meet demand and need to find new ways of working to secure long term improvements in day to day financial management for our clients

Key aspects of the role

Casework

- Work in a supportive and empowering way with clients to improve understanding of their finances and options available to improve it.
- Support clients to take action to maximise their income and or reduce expenditure
- Make home/outreach visits as necessary.
- Provide advice and assistance to other staff and volunteers on financial capability
- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation in line with organisations policies

Project co-ordination

- Monitor progress against the project plan on an ongoing basis and provide reports on agreed objectives to the project steering group.
- Collect, collate and present project monitoring and evaluation data.

Marketing and relationship building

- Effectively promote the service internally and externally
- Assist in developing relationships with potential funders and other partner agencies.
- Assist in the compilation and submission of funding bids for the project.

Plan and provide financial capability activities

- Devise and deliver effective learning and development activities, including adapting training materials from Citizens Advice and others.
- Collate and review feedback on learner outcomes and the quality of the service.

Staff / volunteer supervision

- Train and support a small team of financial capability volunteers.

Research and campaigns

- Assist with research and campaigns work by providing information about clients' circumstances.
- Monitor service provision to ensure that it reaches the widest possible client group.

Professional development

- Keep up to date with personal finance topics, available training materials and other resources.

- Reflect on effectiveness of learning activities delivered and review training practice.
- Prepare for and attend supervision sessions / team meetings / staff meetings as appropriate.

Other duties and responsibilities

- Uphold the aims and principles of the Citizens Advice service and its equal opportunities policies.
- Establish and maintain effective and efficient administration systems for the delivery of the project.
- Use IT for statistical recording, record keeping and document production.
- Carry out administrative tasks related to the job such as photocopying learner evaluation forms, circulating attendance lists and confirming venues.
- Participate fully in the life of the organisation, attending workers' meetings, internal planning events etc. as agreed with line manager.
- Support other organisation work as required (e.g. providing referrals for advice appointments where appropriate).
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Carry out any other appropriate tasks requested by the manager, to ensure the effective delivery and development of the service.

Person specification

1. Empathetic and non-judgemental attitude to people experiencing financial difficulties
2. Knowledge and experience of personal finance issues that affect adults
3. Ability to sensitively empower and engage with adults who have had poor experiences of formal education and/or are vulnerable i.e. mental or physical disability.
4. Ability to develop and manage a complex project - including monitoring progress against objectives, setting up and using systems to collect, collate and share information about project achievements and outcomes.
5. Experience of developing and/or using range of training/motivational resources
6. Ability to use IT applications to record statistics, produce documents and training materials and keep accurate project records.
7. Ability to train and supervise a small team of volunteers and / or staff.
8. A willingness to learn, develop and reflect on practice.
9. Understanding of and commitment to the aims and principles of the Citizens Advice service and its equality and diversity policies.
10. Excellent interpersonal skills, including the ability to relate and work with a large variety of different people.
11. Ability to self-motivate and organise a diverse workload.
12. Effective written and oral communication skills.

Please complete the application form on our website and send it to recruitment@cab-oxford.org.uk closing date 5p.m Tuesday 22nd January 2019