



## Job Description

<b>Role Title:</b> Specialist Money Coach Team Supervisor	<b>Reports to:</b> Money Advice & Education Manager
<b>Position type:</b> One year Fixed Term Contract (this may be extended to three years dependent on future funding)	<b>Working Hours:</b> 17.5 hours per week (The role will involve occasional out-of-hours work)
<b>Location:</b> Based at Mansfield House, 30 Avenons Road, London, E13 8HT (Service delivery includes outreaches & home visits across London boroughs)	
<b>CRB Required:</b> Yes	<b>Salary:</b> £16,000 per year (Full time equivalent £32,000 per year / including 33 days annual leave (inclusive of public hols).

### Overall Purpose of Role

To deliver a consistent, reliable, excellent, customer focused service. To be responsible for the quality and standards of advice across Money A+E. Managing a caseload and leading a team of staff and volunteers to deliver a quality service to residents throughout London.

To be part of a Money Advice and Education Team that facilitates residents' (primarily in London Boroughs) to improve their financial and economic resilience.

To provide specialist welfare benefits, debt advice casework & money guidance / to residents in need or who are unable to self-help, either because they do not have the personal capacity to do so or because of the nature of their issues.

To provide training, supervision and guidance to the Money Coach advisers, trainees and volunteers; enabling them to provide basic money advice and guidance & extra support to residents in need.

To identify other issues affecting residents' ability to improve their financial resilience and work with our education team and external partners by signposting or referrals where appropriate and by working with external services.

To role model Money A+E's values and behaviours of customer focus, partnership working, and efficient use of resources, and be an ambassador for the organisation.

### Role Context

**Money A+E** is a Money Advice & Education Social Enterprise that was set up by 3 money advisers, passionate about providing simple and accessible money advice and education to people in need.

## **Our Vision**

- We believe lives are transformed through Money Advice & Education.

## **Our Mission**

- To empower individuals by providing simple; accessible; independent and effective Money Advice and Education.

If you are passionate about helping people in the community and if you are excited about working with and helping a small social enterprise grow and have a greater impact in the community, then this role is for you.

The **Money Coach** service will provide welfare benefits, debt & money guidance advice across London. We require an experienced specialist adviser to provide:

- One to one specialist advice, casework, advocacy and representation (for vulnerable residents when appropriate)
- Supervision / training support and work experience opportunities for staff and volunteers
- Overseeing quality assurance, compliance and the development of the service
- Support to senior leadership team to implement digital innovations in advice service provision
- Leadership in establishing outreach services with community and outreach partners

## **Key Tasks and Accountabilities:**

Key tasks and accountabilities are intended to be a guide to the range and level of work expected of the post holder. This is not an exhaustive list of all tasks that may fall to the post holder and employees will be expected to carry out such other reasonable duties which may be required from time to time.

To undertake all responsibilities listed below:

### **1. Advice & Casework,**

1. Provide specialist welfare benefit and debt advice (across various communication channels) to improve residents' immediate and future financial situation. The service is to include preparation of debt relief orders, presenting cases to the appropriate statutory bodies, tribunals and courts as appropriate, disputed benefit claims, defending enforcement proceedings, income maximisation, drawing up financial statements, negotiating with creditors, home visits where appropriate and providing advice on money management.
2. Keep accurate case records of important service and management information, such as the number of residents seen, the resident's situation and their information, advice and guidance needs, the advice given, actions taken and time spent on the case.
3. To perform DRO's as a debt resolution strategy for clients.
4. Enable and motivate residents to self-help as far as possible to improve their financial circumstances.
5. Keep the Money Advice & Education Manager informed of caseload and other activities. As appropriate, consult with the Money Advice & Education Manager

on complex issues and/or casework, to help ensure that the organisation is delivering an effective, consistent service.

6. Maintain expertise in relevant legislation (welfare benefit and debt).
7. To meet performance targets required by Money A+E and key stakeholders / funders.
8. Willingness and lead on and develop digital innovations within the service

## **2. Mentoring, Advocacy & Signposting**

1. Provide mentoring, advocacy support and signposting in line with Money A+E's specific procedures and policies.
2. Identify other issues affecting residents' ability maintain or improve their financial wellbeing and potential, then ensure these are dealt with through signposting or referrals, as appropriate.

## **3. Training delivery**

1. To provide internal training to the Money Coach advice team where appropriate.

## **4. Support & Supervision**

2. As part of the team at Money A+E you will provide supervision for other Money Coach advisers, trainees and volunteers.
3. Quality check money advice casework across the organisation.
4. Organise and facilitate meetings for the advice team and volunteers.

## **5. Professional Development**

1. Review and manage own learning and development to ensure that knowledge and skills reflect legislative and case-law changes to ensure appropriate and up to date advice is provided to customers. This will include attending required and recommended training workshops/events.
2. Undertake regular supervision and appraisal meetings with the Money Advice & Education Manager and work towards continuous professional development.

## **6. Stakeholder Management**

1. Set up outreach and maintain good relationships with community partners with Money A+E senior leadership team.
2. A willingness to work with voluntary, public and private sector partners in the work of money A+E.
3. Liaise with internal and external services to develop and maintain an understanding of the residents needs and to provide a holistic support package to residents.
4. Attending appropriate internal and external meetings and service related events / forums in order to stay up to date with current affairs relating to money advice.

5. Representing Money A+E mission, vision, values, service and ethos in presentations and other form of media

## **7. Other duties and responsibilities**

1. To assist in recruiting volunteers. To co-ordinate training and supervision sessions for the volunteers, undertaking regular review and development meetings. To identify residents being helped by volunteers who may require specialist advice.
2. Provide regular reports on the functionality and development of the service.
3. Assist with the production of written procedures, guidance notes and other documentation, to support the smooth running of the service and quality assure information and advice on dealing with debt and benefit problems.
4. Adhere to the Money Advice Service competencies and behaviours in order to manage and resolve a portfolio of debt and benefits cases, maximise income and improve money management.
5. As required by funders and Money A+E management collate statistical data as reports, contributing to the evaluation of the service.
6. Establishing / improving liaison with other agencies, community groups.
7. Willingness to speak to the media on matters relating to the roles specialism on behalf of Money A+E.
8. To support Money A+E's overall goals and vision.

## **7. Governance, Compliance and Health and Safety**

1. To handle and protect confidential and sensitive data with integrity and comply with the data protection act at all times.
2. Where possible deal with any complaints in a timely and professional manner in line with Money A+E's established procedures.
3. To comply with the Money A+E's policies and procedures in relation to the organisation and service.

## **8. Systems & Process**

1. To ensure that key data is recorded, stored and maintained to agreed advice standards and is of good quality, in order to meets the expectations of the quality mark, service and organisation.
2. Use IT and case management systems for statistical recording, record keeping and document production.

## **9. Social Policy**

1. Contributing to organisational response to consultations, legislation, policy and practice changes.

Attending meetings and involvement in research and evaluation on social policy issue important to our service users

2. Assist with social policy work by providing information about resident's circumstances, statistical information and nature of cases.
3. Assist the line manager to monitor service provision to ensure it reaches the targeted resident groups.
4. Keep team members and the Money Advice & Education Manager alert to local and national related issues.

#### **EQUALITY AND DIVERSITY**

We are committed to and champion equality and diversity in all aspects of employment with Money A+E. All employees are expected to understand and promote our Equality and Diversity Policy in the course of their work.

#### **PROTECTING OUR STAFF AND SERVICES**

Adherence to Health and Safety requirements and proper risk management is required from all employees in so far as is relevant to their role. All employees are expected to understand and promote good Health and Safety practices and manage risks appropriately.

# Personal Specification



## IMPORTANT INFORMATION FOR APPLICANTS

The criteria listed in this Person Specification are all essential to the role. Your application needs to demonstrate clearly and concisely how you meet each of the criteria. If you do not address these criteria fully, or if we do not consider that you meet them, you will not be shortlisted. Please give specific examples wherever possible.

CRITERIA	METHOD OF ASSESSMENT
<p><b>KNOWLEDGE:</b></p> <p>A clear understanding of ways in which people can improve their financial situation.</p> <p>Welfare benefit &amp; debt advice specialist competencies, including:</p> <ul style="list-style-type: none"> <li>• Income maximisation</li> <li>• Drawing up financial statements</li> <li>• Creditor powers of enforcement</li> <li>• Defending enforcement action</li> <li>• Formal methods of dealing with debt problems, including bankruptcy, IVA's, Debt Relief Orders</li> <li>• Reconsiderations &amp; appeals</li> </ul> <p>A demonstrable understanding of legislation relevant to benefit &amp; debt advice</p> <p>An understanding of the principles of managing household budgets, debt, credit and saving</p> <p>An appreciation of the concepts affecting behaviour in relation to money management</p> <p>Knowledge of office standards and the Advice Pro case management system</p>	<p>Application Form/Interview</p> <p>Application Form/Test/Interview</p> <p>Application Form/Test/Interview</p> <p>Application Form/Test/Interview</p> <p>Application Form/Interview</p> <p>Application Form/Interview</p>



<p>skills with the ability to draft correspondences, and reports</p> <p>Ability to work well under pressure, prioritise tasks and set own goals, working with minimal supervision to achieve these goals</p> <p>Organisational skills, with ability to keep well organised records.</p> <p>Computer literate including good working knowledge of Microsoft Office (Word, Excel, Outlook and Access)</p> <p>Ability to be impartial, non-judgemental and to empathise</p> <p>Ability to deliver training with a confident and good presentational style.</p> <p>Ability to give and receive feedback objectively and a willingness to challenge constructively</p>	<p>Application Form/Interview</p> <p>Application Form/Test/Interview</p> <p>Application Form/Interview</p> <p>Application Form/Interview</p> <p>Application Form/Interview</p> <p>Application Form/Interview</p> <p>Application Form/Interview</p>
<p><b>PERSONAL STYLE AND BEHAVIOUR:</b></p> <p>Maintains a high standard of ethics and professional conduct</p> <p>Highly motivated and proactive approach to work</p> <p>Demonstrates commitment to the achievement of equal opportunities in both employment and service delivery</p>	<p>Application Form/Interview</p> <p>Application Form/Interview</p> <p>Application Form/Interview</p>
<p><b>OTHER SPECIAL REQUIREMENTS:</b></p> <p>Willingness and ability to work occasional evenings and/or weekend days as required by the needs of the service.</p> <p>Prepared to travel to sector forums, meetings, outreach sessions and home visits when appropriate</p> <p>This post is subject to an enhanced CRB check.</p>	<p>Application Form/Interview</p> <p>Application Form/Interview</p> <p>Satisfactory clearance at conditional offer stage</p>