# **A blue circle with yellow text Description automatically generatedROXBURGH & BERWICKSHIRE CITIZENS ADVICE BUREAU**

**JOB DESCRIPTION**

**Job Title: Money Adviser**

**Responsible to: Chief Officer**

**Type of Contract: Permanent**

**Salary: £31,267 (FTE)**

**Hours of Work: 27 hours – 30 hours (optional range)**

**Location: TBC depending on post holder, Duns / Kelso.**

**Job description**

The Money Advisor is responsible for the quality of advice and delivery of service provided by the Roxburgh and Berwickshire CAB Money Advice Unit, supporting a case load of CAB clients

**Key Responsibilities**

* Providing Type II money advice casework service to clients, undertaking detailed casework at this level on debt matters
* Providing support and capacity building of money advice within the CAB Generalist service, including technical debt support to advisers - staff and volunteers
* To comply with Scottish National Standards of Information, Adviser competences and Citizens Advice Membership Standards

**Summary of responsibilities**

* Take lead responsibility for day to day delivery of money advice work in the east side of Roxburgh and Berwickshire CAB, working closely with staff in money advice roles or trainees, in this CAB
* Responsible for delivery of supervision and training on money advice internally in CAB, alongside other colleagues with money advice roles
* Participate and comply with the CAB’s process for case checking of money advice cases
* Maintaining expertise in relevant legislation with regard to debt and bankruptcy, keeping up to date with knowledge of case law relevant to post
* Undertake detailed casework on multiple debt problems per client
* Maintain detailed statistics of individual debt cases, creating and retain comprehensive money advice and debt records confidential and accessible for future retrieval
* Supervise, train and support team members, CAB advice staff or volunteers, dealing with money advice queries, providing support and guidance on complex cases
* Refer clients on to colleagues or other agencies as appropriate for specialist help with issues that fall outside the remit of the service
* Keep comprehensive records of casework which meet audit requirements, including use of CASTLE case recording system
* To maintain good working relationships with local money advice staff in the Consortium of CABs in Scottish Borders
* Liaise with In-Court Advice and other services to improve and develop accessibility of money advice service as well as other agencies, to ensure appropriate use of services

**Values**

The values of the Citizens Advice Scotland Network, and the Roxburgh & Berwickshire CAB are:

* Person-centred: We are committed to the wellbeing of our clients, volunteers and staff and take a whole person approach to our work.
* Empowering: we invest in people and support them to take action on the challenges they face.
* Supportive: We are caring and respectful and make sure that people receive the support they need to improve their lives.
* Inclusive: We are a non-judgemental, friendly and offer expert service to anyone who is in need of our help.
* Collaborative: We work together as a network and with other partners in an open, respectful way, to build trust even when opinions differ

**Team work and behaviours**

* Share relevant information and give support and encouragement to colleagues, through participating in team meetings, with staff and volunteers
* Assist in the development of the organisation by participating in development days, task groups and training events
* Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively
* Ability and willingness to work as part of a team, with kindness and non-judgementality towards colleagues
* To support the principle of volunteerism in citizens advice
* Maintain and monitor effective and efficient administrative systems
* Demonstrate understanding of social trends and their implications for service provision
* Assist with creating shadowing opportunities and delivery of training when required
* A willingness to learn and develop and reflect on practice, monitoring and maintaining your own standards

**Self-Management & Personal Development**

* Take responsibility for personal safety in and out of the office in accordance with the CAB health and safety procedures, and all CAB policies
* Participate in the support, supervision and appraisal process with the Chief Officer
* Identify own learning needs and participate in identified learning opportunities when required, and feeding back on learning opportunities
* With the Chief Officer, identify and address your training and development needs

**Performance targets and quality standards**

* To inform the Chief Officer about workload monitoring and CAB performance are at risk of not being met and any reasons for unmanageable demand or under-performance
* Identify solutions to resolve any high demand or under-performance on targets and engage positively in discussions with the Chief Officer to achieve the required levels

**Working in Partnership**

* To work in collaboratively with partner agencies, local authority and other local statutory and voluntary organisations in order to increase access to the service and to the range of support and advice needed according to individual circumstances
* To make appropriate referrals in-line with documented procedures, to key partner agencies, for other valid support to solutions for clients or to other advisers or specialist agencies as appropriate where there are other related problems such as employment
* Present a positive image of the Bureau at all times
* Form effective working relations and networking with other organisations and stakeholders, to assist in raising awareness of the service

**Service Development**

* To undertake recommendations from the Chief Officer with regards to planning and developing the debt service in order to meet specific contract requirements
* To contribute information, reports and materials relevant to effective money advice strategies
* To assist with the promotion of the money advice service of CAB to the wider community
* Be contribute to the accurate recording, collation and reporting of statistical data
* To contribute to the Annual Report and newsletter
* Carry out relevant research and consultation exercises
* Assist in developing and gathering evaluation feedback from clients and partners

**Bureau Management & Development**

* To contribute to the strategic development of the Bureau, its impact and services
* To participate in ensuring the Bureau policies, including Health & Safety, Data Protection, Confidentiality and Equal Opportunities policies are put into practice and systems maintained, and share responsibility for own safety and that of colleagues
* You may on occasion and with prior arrangement provide session of advice and telephone rota, e.g. for holiday cover
* To contribute to the collation, gathering and reporting of information for the purposes of local and national social policy work
* To attend relevant meetings with the board of Trustees, e.g. Annual General Meeting
* The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonably requested by the Chief Officer

**Requirements**

* The post is subject to the receipt of a satisfactory PVG (Protection of Vulnerable Groups) Certificate