



<b>JOB TITLE</b>	<b>ADVISOR – MONEYWISE PLUS</b>
<b>SALARY</b>	£19,048- £24,440.40 PER ANNUM FIXED-TERM POST TO MARCH 2023

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**HOURS PER WEEK** 37

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#### BACKGROUND INFORMATION

*Moneywise Plus helps people to develop the skills and confidence we all need to cope with daily challenges such as managing within a tight budget; making savings; using computers and mobile devices; using the internet and online apps etc. The aim of the project is to support people to develop skills so they are able to enter into Job search, employment, training and education.*

*The project is funded by the European Social Fund and The National Lottery Community Fund to March 2023. This post holder will be wholly employed on this National Lottery Community funded project.*

*Reaching People, a consortium of voluntary and community sector organisations, has been awarded the funding as the lead organisation for the project. However, the service is delivered by a range of organisations each with their own strengths, areas of expertise and reach into the community:*

- *Action Homeless*
- *Community Advice & Law Service*
- *Leicester College*
- *Acorn Training*
- *Twin Training*

You will be part of a Moneywise Plus team and you will be self-motivated and confident working autonomously as well as having good team working skills.

You will work at Community Advice and Law Service's main office in Leicester City centre, at outreach venues and some remote home working will be available

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## JOB PURPOSE

Working within the aims of the Moneywise Plus Project and your managing organisation, you will be working as a member of a team of advisers from different organisations and will provide information, advice and guidance to unemployed and unwaged individuals and groups to help overcome barriers and ensure they have the financial, digital and employability skills and confidence to move closer to the labour market

You will be given training, support and mentoring to be able to carry out the role effectively.

You will work to set individual and project targets and within project and funder standards and guidance to sign up new participants; and support individual to achieve their goals and project results.

## MAIN DUTIES

### **1. Provide advice, information support, referral and evaluation support to individual participants which results in their improved digital, financial and employability skills and confidence.**

- Carry outreach activities to promote Moneywise Plus to identify and engage participants make referrals and follow up on action taken.
- Assess individuals to ensure they meet the eligibility criteria and support them to identify their support needs and goals around personal finance and digital inclusion and signpost/refer to other support as necessary.
- Review individual clients digital, financial and employability progression, ensuring evidence of key milestones is recorded at regular intervals.
- Provide digital, financial and employability support, guidance and referral to enable individuals to plan and take realistic action to meet their identified needs.
- Deliver 1-2-1 advice, information and support for digital, financial and employability progression.
- Support disadvantaged and vulnerable people in a professional manner
- Manage your case load and to ensure the progression of individuals with accurate recording of your work.
- Appropriately challenge anyone who infringes upon the Equality and Diversity Policy, and if necessary, refer the matter to the appropriate Line Manager.

### **2. Group work**

- Provide information about the project and promote the work to groups of professionals from other organisations and service users,
- Participate in team meetings, team development and the managing organisation meetings.
- Work in partnership with the Project team to meet project aims and achieve successful financial, digital and employment outcomes.

- Participate in rotas to ensure the advisory service is available at times required and in locations that meet client's needs and project outcomes. This may include provision of support to individuals in their own homes and some out of hours working.
- Co-operate with team members to ensure the effective running of the services.

**3. Work as a member of both the Moneywise Project team and the managing organisations staff team to meet project aims and achieve successful outcomes with participants.**

- Achieve project and funder standards and requirements and operate within project protocols and guidance.
- Use and maintain all administrative systems (both paper and electronic) that enable the effective running of the service, the ability to meet project targets and report to the funder, including support and development tools, entering client details, case notes and recording progression and outcomes on the Moneywise Plus CRM system.
- Actively participate in supervision, training and commitment to continued professional development.
- Manage your time and workload to enable you to meet commitments to people and others.
- Produce written reports to demonstrate the transition that people have achieved.
- Contribute to a culture of continuous improvement and development of this project.

**4. To carry out any other duties that may from time to time become necessary and fall within the scope of the job.**

## POLICIES OF THE MANAGING ORGANISATION

### EQUAL OPPORTUNITIES / VALUING DIVERSITY

- To work towards actively and positively promoting the Equal Opportunities / Valuing Diversity
- To appropriately challenge anyone who infringes upon the Equal Opportunities / Diversity Policy, and if necessary, to refer the matter to the appropriate Line Manager.

### HEALTH & SAFETY

- As far as is practicable you are responsible for adhering to the Health and Safety requirements and shall not place yourself, other staff, volunteers or service users or any other person in danger whilst at work.
- You should not interfere with or misuse any equipment provided for your use either contrary to any training you have received, or any instructions given with the equipment in the interests of health and safety. The Managing lead organisation shall not be liable for any loss or injury caused by any such interference or misuse.

### CODE OF CONDUCT

- To abide by The Managing lead organisation's Code of Conduct Policy and professional boundaries policy

#### FUNCTIONAL LINKS

- Moneywise Plus manager and Moneywise Plus Delivery Team comprise of managing organisation staff teams.
- It is essential to maintain appropriate working links with all professional colleagues in the field.
- It will also be necessary to establish working links with others whose role may affect your work.

#### ENVIRONMENT & STRESS:

- The appointment may require working some evenings and weekends
- The managing organisation is not responsible for paying travel expenses to and from work additionally it does not operate a relocation policy.

# PERSON SPECIFICATION

Department/Site: Community Advice and Law Service  
 Job Title: Advisor – Moneywise Plus

	<b>Criteria (Applicants should provide evidence of their ability to meet the following in the Application form)</b>	<b>Essential</b>	<b>Desirable</b>
<b>1.</b>	<b>Communication</b>		
	<ul style="list-style-type: none"> <li>write accurate reports</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>prepare support plans and papers on issues relating to people's financial and digital support requirements</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>liaise with other delivery partners and external agencies</li> </ul>		✓
	<ul style="list-style-type: none"> <li>speak to groups.</li> </ul>		✓
	<ul style="list-style-type: none"> <li>one to one work assessment, planning and review</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>utilise electronic systems to effectively manage workload including word, excel and e-mail and a CRM system for reporting work</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>support disadvantaged and vulnerable adults who may have challenging behaviour</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>use electronic systems to manage work load including word, excel and email</li> </ul>	✓	
<b>2</b>	<b>Equality &amp; Diversity</b>		
	<ul style="list-style-type: none"> <li>An understanding of and commitment to equal opportunities/valuing diversity and the ability to implement such a policy in all aspects of the work.</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Knowledge/understanding of different languages and cultures</li> </ul>		✓

<b>3.</b>	<b>Leadership</b>		
	<ul style="list-style-type: none"> <li>Ability to plan, monitor, deliver and evaluate a programme of financial digital and employability support to people.</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Deliver group work sessions</li> </ul>		✓
	<ul style="list-style-type: none"> <li>Work independently and be self-motivated</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Manage the day to day administrative tasks of the post</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Devise and plan appropriate financial support programmes</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Effective time management to meet deadlines and commitments</li> </ul>	✓	
	Ability to work to targets	✓	
<b>4.</b>	<b>Team Working</b>		
	<ul style="list-style-type: none"> <li>Work within a team</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Contribute to team knowledge and development</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Work with others to ensure tasks are complete</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Ability to work flexibly</li> </ul>	✓	
<b>5</b>	<b>Working within Legal Framework</b>		

	<ul style="list-style-type: none"> <li>An understanding of Health &amp; Safety policy and the ability to implement this within the work, including in lone working settings</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Ability to carry out risk assessments and comply with safe guarding reporting requirements</li> </ul>	✓	
<b>6.</b>	<b>Qualifications/Experience</b>		
	<ul style="list-style-type: none"> <li>Have or be working towards a relevant qualification to degree/diploma level with a minimum of G.C.S.E level C in Maths and / or finance and English.</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Be a competent IT user with experience in preparing and creating electronic documents, entering data and using CRM systems.</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Experience of case load management through assessment, planning, evaluation and review of individuals to ensure progress towards outcomes.</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Experience of working with disadvantaged people and assisting them to develop their digital skills and financial capability</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Experience of working with people who are unemployed or economically inactive people, with knowledge and understanding of some of the social issues and barriers they may face.</li> </ul>	✓	
	<ul style="list-style-type: none"> <li>Ability to drive and have access to your own transport</li> </ul>		✓

FOR OFFICE USE ONLY

<b>Name of Interview Panel Member:</b>	<b>Signature of Interview Panel:</b>
<b>Recommendation:</b>	<b>Date:</b>

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