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| **Job Profile** |
| **Job Title** | **Moneywise Plus Advisor**  |
| **Hours per Week** | 37 hour post |
| **Salary** | up to £23,069 FTE (dependent upon experience) |
| **Fixed Term** | until 30th June 2022 |
| **Responsible to** | Senior Moneywise Plus Advisor |
| **Service/Team** | Moneywise Plus Engagement Team  |
| **Job Number** | GEN-HR-041 |
| **Base/Location** | 38 Leicester Road, Loughborough, LE11 2AG |

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| **Job Purpose** |
| The Building Better Opportunities Programme is jointly funded by The National Lottery Community Fund and the European Social Fund. Moneywise Plus, led by Reaching People, works with those aged 18+ to improve their financial and digital skills, enabling individuals to move closer to the labour market. Other delivery partners include:

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| * The Y;
* Action Homeless;
* Community Advice and Law Service;
 | * Leicestershire County Council;
* Citizens Advice Leicestershire; and,
* Leicester College;
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The post holder will be working as a member of a team of advisors from across the partnership providing information, advice and guidance to unemployed, unwaged and economically inactive individuals and groups; this will involve having a key role in the promotion of Moneywise Plus and undertaking outreach work.The pos tholder will register new participants onto the project and undertake an in-depth assessment of their needs. Participants will be supported to develop action plans, with the aim of moving them closer to their employment or education goals by ensuring that they demonstrate improved IT and money management skills and the ability to job search.  |
| **Main Duties and Responsibilities** |
| **Holistic Advice and Support** |
| * Engage with hard to reach individuals through community venues, events and Moneywise Plus digital taster sessions across Leicester City and Leicestershire
* Work closely with the Referrals Administrator, ensuring contact is made with participants who have been referred directly into the service via other agencies
* Undertake needs and risk assessments with potential participants to identify potential barriers to engagement
* Undertake home visits when required to register potential participants with barriers to engagement
* Register new participants on to the project evidencing eligibility and completing relevant paperwork in line with funders requirements
* Provide one-to-one advice, support and guidance to Moneywise Plus participants wanting to improve their financial and digital skills (including using the internet, saving money, budgeting, managing money online etc.
* Develop bespoke actions plans with participants to ensure they achieve their education, training or employment goals
* Ensure participants are referred to specialist support to overcome any other complex needs which cannot be met by Moneywise Plus
* Work closely with the Referrals Administrator and other Moneywise Plus Advisors to identify non-engaging participants in order to re-engage them on the project
* Contribute to individual and Moneywise Plus Project participant, soft outcome and results targets
* Support the wider project by providing cover for Advisors, and the Referrals Administrator, to ensure the efficient operation of Moneywise Plus
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| **Outreach and Promotion** |
| * Undertake regular promotional activities across Leicester and Leicestershire to ensure participants are aware of the service
* Actively identify groups/organisations where outreach work could be completed to engage with, and sign up, hard to reach individuals
* Be an ambassador for the Moneywise Plus Project when speaking to professionals and potential participants
* Encourage participants to ‘tell their story’ and contribute ideas to the marketing and communication function of Moneywise Plus
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| **Other Moneywise Plus Duties** |
| * Effectively create, manage and close down participant files, ensuring all relevant paperwork and documentation is completed to guarantee compliance with funders
* Complete individual KPI spreadsheets/action plans in line with individual targets and project outcomes for monthly and quarterly monitoring reports
* Ensure the Charity Log CMS is updated in a timely manner, ensuring accurate recording
* Support the delivery of the Moneywise Plus ‘Equalities’ and ‘Sustainable Development’ Action Plans
* Attend regular Moneywise Plus Team Meetings, whilst ensuring meaningful contribution to the development and sustainability of the project
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| **General Organisational Duties** |
| * To comply with, and adhere to, The Bridge’s Quality Management System (QMS)
* To take responsibility for producing your own correspondence
* To engage with, and contribute in, your own Training and Continual Professional Development
* To embed and exhibit The Bridge (East Midland) Values and Ethos in your work
* To take responsibility for your own health and safety and that of others in line with The Bridge (East Midlands) Health and Safety Policy
* To ensure you have an awareness of the categories of abuse, and the processes involved in the safeguarding of children, young people and vulnerable adults
* To undertake other duties as required by the Chief Officer to ensure the smooth running of The Bridge
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| **Special Factors** |
| * This role is required to work occasional evenings and weekends
* A full driving licence and the use of a car is essential for this role
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| **Person Specification** |

The following criteria define the relevant knowledge, experience, skills and abilities which a candidate will need to demonstrate throughout the recruitment process. The criteria will be assessed at different stages including Application (A), Interview (I), Test (T) or Presentation (P).

In the final column we have provided a weighting in respect of the importance of meeting each criterion; 1 necessary, 2 important, 3 essential. The answer to each criterion will then be scored by members of the shortlisting panel on a scale of 0 to 2; 0 unmet, 1 part-met and 2 met. The total score of the application form will then be converted into a percentage which will be assessed against the organisational shortlisting thresholds. Candidates who meet, or exceed, this threshold will be invited to interview.

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| **No.** | **Criteria** | **A** | **I** | **T/P** | **W** |
| 1 | Substantial and demonstratable experience of assessing the needs of individuals and identifying their support needs | X | X | X | 3 |
| 2 | Substantial and demonstratable experience of engaging and maintaining professional relationships with hard to reach clients  | X | X |  | 2 |
| 3 | Thorough working knowledge of the social issues affecting people who are unemployed or economically inactive | X | X | X | 3 |
| 4 | Experience if facilitating group work and/or taster sessions, preferably with a digital and/or financial focus | X |  |  | 1 |
| 5 | A working knowledge of Windows and software, including Microsoft Office & other complex CRM databases (e.g. Charity Log) | X |  |  | 3 |
| 6 | Ability to be non-judgemental and sensitive to the individual needs or vulnerable and disadvantaged clients  | X | X |  | 2 |
| 7 | Ability to engage with a broad range of professionals utilising high level written and verbal communication skills | X | X |  | 2 |
| 8 | Ability to set and work within challenging targets and achieve high level outcomes | X | X |  | 3 |
| 9 | The ability to work on your own initiative and organise and manage several work strands simultaneously | X | X |  | 2 |
| 10 | The ability to deliver clear and concise presentations to promote a new service and encourage referrals from a range of stakeholders  | X |  |  | 1 |
| 11 | A high-level commitment to the principles of confidentiality and how these are embedded into day to day work with clients |  | X |  | 2 |
| 12 | A high-level commitment to ensuring that The Bridge’s Values and Principles are embedded in your day to day work |  | X |  | 3 |
| 13 | A thorough understanding of equal opportunities and diversity and how to counter discrimination within a service delivery setting |  | X |  | 3 |
| 14 | A thorough understanding of safeguarding processes and procedures for children, young people and vulnerable adults |  | X |  | 3 |

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| **Document Control** |
| **Prepared by** | Chantelle Bramley  | **Date** | 01/10/2019 |
| **QMS Document No.** | GEN-HR-041 | **Version** | v1.0 |