

## Citizens Advice 1066

### Job Description- Financial Capability trainer/advisor

**Role purpose:** To deliver financial capability training and advice

**Job Responsibilities:** Delivering financial capability sessions in an interesting and engaging manner; covering debt prevention, money management and digital skills such as budgeting, using bank accounts, options for borrowing and saving, and dealing with debt.

Main Responsibilities	Key Tasks	Time %
<p><b>Financial Capability Training Activities</b></p> <p><b>Energy Advice and training</b></p>	<ul style="list-style-type: none"> <li>• Work with learners, clients and partner agencies to identify learners' financial capability needs.</li> <li>• Devise effective learning activities, including adapting training materials from Citizens Advice and others.</li> <li>• Deliver financial capability learning activities (e.g. small group training, one to one mentoring).</li> <li>• Ensure that learning activities are well organised (e.g. room bookings, equipment and refreshments).</li> <li>• Collate and review feedback on learner outcomes and the quality of the service.</li> <li>• Collect, collate and present project monitoring and evaluation data.</li> <li>• Develop literature to promote the project and carry out other marketing activities such as writing press releases or delivering presentations.</li> <li>• Reflect on effectiveness of learning activities delivered and review training practice.</li> <li>• Keep up to date with personal finance topics, available training materials and other resources.</li> <li>• Deliver energy advice to clients on issues such as energy switching suppliers, energy debts and disputes.</li> <li>• Support CA1066 projects to deliver effective training on energy issues to Energy Champions, tenants and residents as required</li> <li>• Keep up to date with developments in Energy issues affecting the local area.</li> </ul>	<p><b>65%</b></p>
<p><b>Working with partners</b></p>	<ul style="list-style-type: none"> <li>• Establish, develop and maintain a range of partnerships to reach learners and gain support for the project.</li> <li>• Attend relevant external meetings</li> </ul>	<p><b>15%</b></p>
<p><b>Administration and other general duties</b></p>	<ul style="list-style-type: none"> <li>• Establish and maintain effective and efficient administration systems for the delivery of the project.</li> <li>• Use IT for statistical recording, record keeping and document production.</li> <li>• Participate fully in the life of the bureau, attend workers meetings, internal planning events etc as agreed with line manager.</li> <li>• Support other bureau work as required.</li> <li>• Abide by CA1066 health and safety guidelines.</li> <li>• Carry out any other appropriate tasks requested by the manager, to ensure the effective delivery and development of the service.</li> <li>• Undertake tasks related to continuous professional development.</li> <li>• Promote the aims, policies, and membership requirements of the Citizens Advice service.</li> </ul>	<p><b>20%</b></p>

## Person specification

The Financial Capability Trainer/Advisor must have commitment to CA 1066 objects, support its ethos and have the following skills;

- NVQ Level 2/Gateway certificate.
- Knowledge and experience of using IT systems and packages to provide effective support in the delivery of services;
- Demonstrable knowledge and understanding of the needs of people from diverse social/cultural and racial backgrounds and with a wide range of abilities.
- Demonstrable organisational skills, flexibility, ability to negotiate and prioritise own work
  
- Understanding of theory and principles of adult learning and development.
- Experience of empowering and engaging with adults who have had poor experiences of formal education.
- Demonstrable experience of planning and developing learning activities.
- Demonstrable interpersonal skills, including the ability to relate and work with a large variety of different people.
- Numerate and literate to the level required by the tasks.
- Experience of working in a customer service focussed setting

### Key Competencies for the job

Meeting Customers' Needs	Planning and Organising
Achieving Quality Solutions	Problem-solving and Decision-making
Working Well Together	
Innovative and Adaptable to Change	
Understanding the Business and its Environment	

### A competent person demonstrates they:

- Make a positive contribution to team objectives
- Achieve agreed standards and objectives
- Demonstrate understanding of responsibilities of role
- Know who to ask for and how to access information
- Manage own workload effectively
- Demonstrate ability to use IT systems to produce high quality documents and interpret data