

Financial Capability Volunteer **Role Description**



NB. Please read these BEFORE completing the application form

What skills and qualities do Financial Capability Volunteers need?

Skills

- Excellent communication skills including being able to communicate effectively in writing, in person and over the telephone
- Ability to sift through information and extract what is relevant
- Ability to deliver training workshops to groups
- High level of numerical and literacy skills
- Able to use IT in order to carry out basic keyboard and data entry work
- Able to work as part of a team
- Able to manage time effectively
- Ability to give feedback clearly and sensitively
- Able to research, analyse and explain complex information
- An understanding of the difference between financial capability training and debt advice

Qualities

- Confident in dealing with people both in groups and individually
- A positive attitude to self-development and assessment including a willingness to develop, learn new skills and embrace change
- Friendly and approachable
- Remaining calm in stressful situations
- Sensitive to the needs of others
- Open minded and non-judgemental
- Respect for views, values and cultures that are different to their own
- Punctuality and regular attendance
- Flexibility about travelling to and running training sessions at time and locations most accessible to client group

Additionally, you must be willing to develop a clear understanding of, and commitment to, Citizens Advice aims and principles and policies on Equality and Diversity; incorporating these into all aspects of the work.

What do financial capability volunteers do?

- **Purpose of the role**

To develop and deliver financial education to a variety of community groups and individuals on a one to one basis

- **Interviewing**

They interview clients and provide budgeting advice to them to help prevent them getting into debt and provide referrals to other advice appointments when necessary and appropriate for the client.

- **Delivering Workshops**

They deliver workshops to groups of residents, designing and / or selecting resources appropriate to the target audience. They need to ensure all resources are prepared in advance of a training session and that feedback is received from those who receive training.

- **Maintain accurate records**

After training sessions delivered they keep maintain records about who has received the training, and produce reports if required to demonstrate meeting of targets.

- **Preventing problems**

Bureaux collect a lot of information on the different problems that clients have. Identifying social policy issues arising from work with clients is used to influence government policy or a company practice. Financial capability volunteers need to be aware of current issues facing clients.

- **Administration**

Financial Capability volunteers may be asked to help out with some basic office work, for example keeping the financial capability information files or local information up to date, amending stocks of leaflets, typing letters etc.

What support and training do you get?

All financial capability volunteers complete a training Programme. This can last for up to 2 months depending upon the amount of time you can give and includes:

- training packs and observation on the advice process (interviewing) and workshops
- a training course to explore how to deliver workshops
- interviewing clients and delivering workshops with close support and supervision and attending further courses as needed.

What we want from financial capability volunteers

- **Impartiality**

Whatever your views are, you will be expected to advise all kinds of clients on any kind of problem they have. You will need to be prepared to examine your own views and feelings to make sure that you are able to give an equally good service to everyone.

- **Equal opportunities**

All financial capability volunteers are expected to carry out the CAB's policy of equal opportunities. This means actively opposing all forms of discrimination and ensuring that the service is equally available to all people.

- **Confidentiality**

Everything that you see and hear in the bureau is private. Every volunteer must sign an agreement to observe a strict rule of confidentiality before they start volunteering.

- **A commitment to training**

A willingness to learn and develop is central to being an effective financial capability volunteer. Learning to be a financial capability volunteer involves a commitment to training and learning. All volunteers periodically assess and are assessed on how they are performing via a set of competences specifically adapted for the role of adviser. This helps identify training and development needs.

Things are always changing and you will need to spend some time reading in order to keep yourself up to date. All kinds of training courses, sessions and self-study material are available for volunteers to develop their skills and knowledge.

- **Team meetings**

As part of your continuing development it is a priority to attend the bureau staff meetings. They provide a forum for training, case discussion, explanation of policy and practice, and mutual support.

- **Time**

To run an effective service we generally need advisers to volunteer in the bureau a minimum of 1 day per week.

Do you get expenses?

It is CAB policy that bureau volunteers should get out-of-pocket expenses. You should talk to the Training and Quality Supervisor about the arrangements.

What happens after you have filled in the application form?

Return the form to the Training and Quality Supervisor, who will explain how the selection procedure works.

Note: To ensure the safety of our clients, the Citizens Advice service requires that all volunteers who have direct access to clients, where any part of the work is primarily targeted at legally defined vulnerable adults or children, to have their criminal records checked. However, the Citizens Advice service is committed to the promotion and delivery of equal opportunities to volunteers and so has a policy to ensure ex-offenders are not discriminated against.

Please keep these notes