

Digital Money Coach - Role Description

NB. Please read these BEFORE completing the application form

Purpose of the role

The overall aim of the post is to support clients who are accessing advice to embed financially capable habits and behaviours, such as budgeting and energy switching, as well as improving their digital capability.

Digital Money Coaches support clients in three key areas:

- Enabling clients to take action and build habits that will improve their financial capability and build resilience to future financial shocks.
- Provide practical, hands-on support that improves the client's digital capability and computer skills, particularly those that will enable them to manage the transition to Universal Credit.
- Take action to reduce the proportion of their household income spent on energy.

The emphasis is action oriented; working with the client to identify what they want to accomplish and then working with them to provide the skills and knowledge they need to achieve their goals.

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

What we want from a Digital Money Coach?

- **Equal opportunities**

All Citizens Advice Westminster staff and volunteers are expected to carry out the organisation'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 organisation is private. All staff and volunteers must sign an agreement to observe a strict rule of confidentiality before they start in the bureau.

- **A commitment to training**

A willingness to learn and develop is central to being an effective volunteer. Learning to be a Digital Money Coach involves a real commitment to training and learning. All Digital Money Coaches are periodically assessed as to how they are performing via a set of competences specifically adapted for this role. 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.

- **Organisation team meetings**

As part of your continuing development it is a priority to attend the monthly team 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 the Digital Money Coach to volunteer in the bureau a minimum of 2 days per week (Monday – Friday).

Do I get expenses?

It is CAW policy that volunteers should get out-of-pocket expenses, which is covered in our Volunteer Expenses policy. You can find out more details at the Open Day.

If you are interested in joining us as a Volunteer, please come along to an Open Day for more information. To book your place, please visit our website and complete an “Expression of Interests form”:

<https://www.westminstercab.org.uk/volunteering/>

Please send your completed **Expression of Interest** to:

volunteering@westminstercab.org.uk

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, 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