



LOTTERY FUNDED



European Union
European
Social Fund



Job Description

Title of Post:	New Horizons Coach
Location:	West Norfolk
Responsible to:	Development Manager
Hours of Work:	37 hours per week

Context: NCA is an independent organisation providing free, confidential information, advice and advocacy to the public.

Role Purpose: To support people in identifying their goals around money, work and being online; develop their skills and confidence around those issues; and enable people to make progress towards their goals.

The role is working solely on the New Horizons project.

Key work areas and tasks:

1. Working with participants

- Provide assistance to participants face to face and via telephone on financial matters and on how to get on-line
- helping participants to produce budgets
- giving coaching on effective financial management
- Explain implications of debts and options available
- Checking participants are claiming all benefits that they are entitled to and assisting in any claim process(es)
- Encouraging and supporting participants to utilise IT resources
- Working with a partner agency to help participants gain skills to help them to move closer to employability.

2. Learning and development

- Work with learners and partner agencies to identify learners' financial capability needs.
- Identifying basic ICT training needs and help participants get on-line, signposting

to IT courses where relevant

- Devise effective learning activities, including adapting training materials from Citizens Advice and others
- Keep up to date with personal finance topics, available training materials and other resources
- Reflect on effectiveness of learning activities delivered and review training practice.
- Prepare for and attend supervision sessions / team meetings / staff meetings as appropriate.
- Identify and implement plans for own development needs

3. Wider Environment

- Promote financial capability to the team and to partners, giving presentations and delivering updates whenever required.
- Keep up to date with changes in legislation, policies and practices in relation to money advice, identifying your own training needs where appropriate, Sharing such information to other members of the team
- Support generalist advice by assisting volunteers with queries relevant to position and help to ensure internal referral procedures operate effectively.
- Attend meetings of the face to face team workers and other workers as appropriate
- Participate in the work of the department as a team member, being prepared to give and receive support from other members
- Proactively, as required by funders and Bureau management collate statistical data as reports to the Bureau Accounts team.

4. Administration

- Administrate cases in accordance with unit policies and practices and to the requirements of funders.
- Carry out all administration and clerical duties including database entry of all records upon the Bureau's nominated database, and the New Horizons MIS database ensuring all required records are kept up to date.
- Maintain your electronic diary for appointments and next actions
- Check eligibility of participant prior to enrolling them on the project
- Ensure all required records and statistical information are kept up to date on files and submitted on time for monthly reports, including relevant information to meet the contractual deadlines.
- Ensure that social policy issues that affect both locally and nationally, are actively informing organisational policy and practice
- Maintain case recording systems to permit monitoring and analysis.
- Contribute suggestions on improvements to policies and CAB procedures contained within the Office Manual
- General typing/word processing, filing, photocopying and other clerical duties.

- Dealing with phone calls from participants and third parties, and taking messages for team members. Dealing with referrals from outside agencies and generalist advisers in the bureau.

5. Targets

- Meet performance targets required by the Bureau and key stakeholders

6. General

- Uphold the aims and principles of the CAB service and its equal opportunities policies.
- and share responsibility for own safety and that of colleagues.
- Carry out any other appropriate tasks requested by the manager, to ensure the effective delivery and development of the service.

7. Equal Opportunities

- To carry out the above within the spirit and practices of the unit's equal opportunities policies and to conform to the standards of behaviour and professionalism as laid down in unit procedures and policies.

Person Specification

The following criteria will be used in short listing for the interview so it is important that you give as much detail as possible on your application form.

Essential	Desirable	How Assessed
Ability to manage project deliverables - including monitoring progress against objectives and working with a range of partners.		Application / Interview/ test
Ability to collect, analyse and present project data.		Application / Interview/ test
Ability to set up and use systems to collect, collate and share information about project achievements and outcomes.		Application / Interview/ test
	Experience of establishing and developing partnerships with other agencies and joint working.	Application / Interview
	Understanding of theory and principles of adult learning and development.	Application
Ability / experience of planning and developing learning activities.		Interview/ test
Ability to sensitively empower and engage with adults who have had poor experiences of formal education.		Application / Interview
A basic knowledge of the personal finance issues that affect adults at risk of financial exclusion.		Application / Interview/ test
Understanding of and commitment to the aims and principles of the CAB service and its equal opportunities policies.		Interview
A willingness to learn and develop and reflect on practice.		Application / Interview
Excellent interpersonal skills, including the ability to relate and work with a large variety of different people.		Application / Interview
Ability to monitor and maintain own standards.		
An ability and willingness to work		Application / Interview

both on own initiative and as part of a team		
Ability to self-motivate and organise a diverse workload.		Application / Interview
Numerate and literate to the level required by the tasks.		Application / Interview
Effective written and oral communication skills.		Application / Interview
Ability to use IT applications to record statistics, produce documents and training materials and keep accurate project records.		Application / Interview
Ability to enable people to identify their long term goals and the steps required to achieve these		
Ability to review action plans with individuals in a constructive way		
Ability to provide support and advice to people at an appropriate level, particularly people with basic skills (numeracy and literacy)		