## C:\Users\Amanda\Documents\WCDT\WCDT ADMIN\WCDT Logo.JPG

## Whitburn Information & Advice Service: Money Mentor

## Role Description

**Project Overview:**

The volunteer led Information and Advice Service has been set up to provide free local advice, information and support in Whitburn to help residents deal with a range of issues mainly related to financial hardship. The service is aimed at all adults living and working in the Whitburn and District area

The Volunteer Money Mentors will focus on providing information support and guidance to promote financial capability with clients who have been referred or self-referred to the service.

**The role of the volunteer advisor:**

* Provide face-to-face often one to one information and support to clients within the Community Development Trust Office
* Develop a mentoring relationship to support and empower clients to reach their financial capability by: Helping clients identify income and expenditure and develop a realistic budget, supporting clients to identify and deal with financial priorities and to seek professional help when required.
* Find, interpret and communicate the relevant information as set out with the volunteer training programme
* Promoting the work WCDT do within the local area
* Making appropriate referrals and signposting clients to other partners organisations services and agencies in West Lothian and beyond
* Monitoring enquiries and feeding into organisations reporting system
* Attend essential advisor training and volunteer advisor meetings to feed in experiences and good practice

**Time Commitment:**

The basic time commitment is between 2-6 hours per week, to include time for a number of drop in session’s plus additional time necessary for meetings, training, keeping up to date with new information, dealing with administration, etc. Actual hours will be to be discussed further and agreed with each volunteer following interview. Volunteers will be required to be available for training on a weekly basis planned for Sept 2013.

**Essential skills required for this role:**

* A commitment to the aims and principles of the information and advice service
* Being open and approachable
* Ability to communicate clearly both verbally and in writing
* Ability to sift through information quickly and extract what is relevant
* Respect for views, values and cultures that are different to own
* An understanding of why confidentiality is important
* Ability to recognise their own limits and boundaries in the role.
* Excellent listening skills
* Basic mathematical skills
* Basic IT skills
* Impartial and supportive attitude
* Able to work as part of a team
* Knowledge of welfare benefits, energy efficiency or money advice would be beneficial but not essential as training will be given

# Volunteer Training

Support will be given to ensure volunteers are competent and confident to deliver an effective advice service. Volunteers will be required to attend ongoing support meetings and training sessions.

The training programme will include the following and may be delivered at the WCDT premises or one of our partner organisations sites (expenses will be covered where travel is required).

* Interview/advice giving techniques
* Money advice & budgeting skills
* Improving and sharing IT skills
* Introduction to Welfare Benefits
* Information from other local providers and partners and their services
* In-house monitoring and contacts databases
* Other training deemed relevant by WCDT

The advice service will be based at the WCDT premises at 61 West Main Street Whitburn.

# Benefits and support

* Reimbursement of travel and subsistence expenses (with valid receipts)
* Access to training
* Managerial support & supervision
* Access to local volunteer network and volunteer

For an informal chat or application form please contact Amanda McKay Project Officer Whitburn and District Community Development Trust on 01501 748708 email: [amanda@whitbuncdt.org.uk](mailto:amanda@whitbuncdt.org.uk) or visit the website to download and application [www.whitburncdt.org.uk](http://www.whitburncdt.org.uk)