

MONEY
ADVICE TRUST

BUSINESS
DEBTLINE

NATIONAL
DEBTLINE

WISER
ADVISER

Training and Development Operations Manager Recruitment Pack

Money Advice Trust

August 2019

Contents

- ✓ Page 3 About us
- ✓ Page 5 Advert
- ✓ Page 6 Job description
- ✓ Page 7 Person specification
- ✓ Page 9 How to apply
- ✓ Page 10 Terms and conditions and employee benefits

About us

The Money Advice Trust is a charity which helps people across the UK tackle their debts and manage their money with confidence. The Trust's main activities are providing free advice through National Debtline and Business Debtline; supporting advisers through Wiseradviser; providing training and consultancy to companies; and improving the UK's money and debt environment through policy, research and awareness raising campaigns. We work closely with a range of stakeholders from industry, the advice sector, government and regulators; partnership is at the heart of how we fulfil our mission. You can find out more about us by visiting www.moneyadvice Trust.org.

NATIONAL DEBTLINE

National Debtline provides free advice and resources to help people deal with their debts. Our service is available over the phone, through our website and via webchat. Run by the Money Advice Trust, National Debtline offers practical self-help – empowering people in debt to speak to creditors directly and put solutions in place to resolve their debt problems. Last year, (2018), we helped 98,890 people on the phone and a further 54,050 people through our webchat service. In addition there were 1,371,590 visits to the National Debtline website. 94% of our callers say they are clear on the next steps they need to take following our advice. National Debtline is completely free, confidential and independent. For more information, visit www.nationaldebtline.org.

BUSINESS DEBTLINE

Business Debtline provides free advice and resources to help people deal with their business finances and business debts. Our service is available over the phone, through our website and via webchat. Run by the Money Advice Trust, Business Debtline offers practical self-help – empowering people to speak to creditors directly, and put solutions in place to resolve their business finance and debt problems. Our debt advisers are experts and help thousands of people with their finances every year. Last year (2018), we helped over 34,490 small businesses and self-employed people by phone, and a further 16,880 people through our webchat service. In addition there were 338,540 visits to the Business Debtline website. 93% of callers say they are clear on the next steps they need to take following our advice. Business Debtline is the only free debt advice service for small businesses and the self-employed in the UK, and is completely confidential and independent. For more information, visit www.businessdebtline.org.

WISER ADVISER

Wiseradviser provides training and support, online and face-to-face, to advisers in free-to-client organisations across the UK. Last year, Wiseradviser provided over 10,730 training places to advisers in 820 free-to-client organisations across the UK. 95% of people who use our training find that it has helped them do their job. You can find out more by visiting www.wiseradviser.org.



A Living Wage Employer

The Money Advice Trust is proud to be a Living Wage employer, having been accredited in April 2015. This means that every member of staff in our organisation earns not just the minimum wage but the Living Wage. For more information visit www.livingwage.org.uk

A look to the future

Our overall aim is to help people across the UK to tackle their debts and manage their money with confidence. Our rolling annual plan focuses on how we will 'help more people, more effectively'.

We are achieving this by realising the benefits of the recent investment the Trust has made in technology, building in-house capabilities to improve the services that we offer and in doing so, becoming more cost effective. Over the next three years, we will continue to grow the number of people we serve both directly through our advice services and indirectly via our support to advisers in the sector through Wiseraadviser.

Our partnerships with the wider advice sector also enable us to move more clients to phone and online advice meaning we can support more people. This, together with the enhanced use of data will give us the evidence to better understand the indebted population and the causes and impact of debt, and demonstrate how we have successfully 'helped more people, more effectively'.

Impact Report

Our [Impact Report](#) is a summary of our statistics showing how we have helped more people, more effectively through the Trust's services.

Our values

Extensive work has been conducted involving our staff in developing our values. The outcome was three simple, but effective statements that describe our culture: Be Balanced; Be Supportive; Be Innovative. We are looking to recruit someone who reflects these values and who can help continue to embed these.

What our employees say



Scott, Business Debtline adviser

“The greatest compliment I have received from clients I have helped is them saying, “I have been able to sleep soundly again!” The job satisfaction and pride I have in my role is immeasurable. I’m proud that by the time clients have hung up they are clear on their next steps and to be part of an organisation that has a positive impact on individual lives, each and every call.”



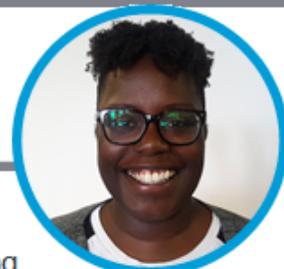
Dan, National Debtline adviser

“Before joining National Debtline I never realised how vulnerable people could be. But, I have also learned just how much people can be empowered to improve their situation. My favourite part of the job is when someone calls you believing there is no way out from their situation, then, over the course of the call you can feel their confidence increasing to the point where you know that going forward they are going to be able to take really positive, potentially life-changing steps.”



Deborah, quality assurance manager

“I have been at the Trust for over 20 years and seen many changes in the debt advice sector during this time. Ensuring quality has always been a central part of our work. Last year we built on our approach to ensure the needs of the individual remain at the forefront and we improved how we identify people in vulnerable circumstances. Advisers receive bespoke training to improve how they encourage disclosure from the people we help so that we can adapt our support to their needs. This includes breaking down advice into manageable chunks and arranging call backs.”



Regina, digital advice officer

“Having previously worked as an adviser I had a good understanding of debt advice clients. In our digital team we work hard to ensure that all of our website content covers what people need to know. Our user testing shows how people interact with our digital services and the feedback enables us to make changes that we know will benefit our clients.”

Training and Development Operations Manager (Debt Advice)

Circa £41k + benefits

Central London

Are you excited by how training and continuous professional development can be used to help people in financial difficulty?

We are. Since its launch in 1991, the Money Advice Trust has developed a reputation for high quality debt advice, training, tools and services. Our mission is to support people and small businesses to deal with their debts, train the free advice sector, and improve the UK's money and debt environment. We provide thousands of free training places every year for debt advisers across the UK through our 'Wiseradviser' programme through both face to face and digital channels.

This is a unique opportunity to join a charity that is transforming its delivery of advice, and learning and development services. As part of the team, you will lead on the delivery and quality assurance of our 'Wiseradviser' services/materials for debt advisers across the UK. You will collaborate with organisations who fund us through donations or commissioned contracts, debt advice sector partners and internal and external subject matter experts to develop and implement learning solutions, services and materials for advisers working or volunteering within our partner organisations across the UK. Furthermore, this role will act as an ambassador for the 'Wiseradviser' brand by generating funding and raising the profile of the service.

You will have significant L&D experience; be accustomed to collaborating with and reporting to funders and commissioners as well as demonstrating a positive outlook with strong inter-personal skills, enthusiasm and resilience. You will have strong presentation skills and be a convincing and persuasive communicator as well as substantial experience of managing projects, overseeing the production of training pathways and working with a network of trainers.

Furthermore, you will live our values, by being balanced, supportive and innovative which are core to what we do and how we work together.

Please send a CV and covering letter to recruitment@moneyadvicetrust.org giving supporting evidence of how you meet the criteria for the role as outlined in the job description and person specification. To download a full recruitment pack which gives more information on the Trust, please visit our website at www.moneyadvicetrust.org.

The closing date for applications is Friday 6th September

Unfortunately due to the expected volume of interest for this role, we will not be able to respond to each application. Therefore if you have not been contacted on the shortlist date, you have been unsuccessful on this occasion but we may keep your details on file for future roles that may be of interest.

Job Description

Title: Training and Development Operations Manager (Debt Advice)

Reports to: Head of Training and Consultancy

Based at: 21 Garlick Hill, London EC4V 2AU

Job Purpose:

- Reporting to the Head of Training and Consultancy, develop and deliver a strategy for the Wiseradviser training service.
- To lead the Wiseradviser team in the delivery of Wiseradviser services/materials for advisers across the UK that provide debt advice.
- To plan, produce and manage learning projects keeping them under review.
- To lead on quality assurance for Wiseradviser.
- To lead on the delivery of funder training grant agreements and externally driven projects.
- To manage the Wiseradviser operations to achieve Business Plan targets.
- To work with the Public Affairs team to help shape marketing activity that supports the overall Wiseradviser strategy informed by user and market insight

Key Responsibilities and Accountabilities:

Strategy and marketing

- Working under the Head of Training and Consultancy, develop the business strategy for Wiseradviser, and lead on its implementation.
- Work with the Public Affairs team to develop the marketing plan, in line with the business strategy, and act as the main point of contact in its implementation.
- Manage the production of the annual Wiseradviser Training Needs Analysis, working with the Trust's insight team, marketing consultant (training) and Wiseradviser team to inform the strategy.

Contract and Stakeholder Management:

- Manage the delivery of funder training grants, including developing future funding proposals, overseeing progress and financial reporting, and ensuring all external targets are met.
- Manage the relationships with sector partners to develop funded projects. Ensure partners are aware of developments within the Money Advice Trust through regular communication.
- Oversee the Wiseradviser delivery partners' grant applications process and manage their contracts, ensuring all outputs are met, agreeing action plans where these are threatened.

Production of learning materials and face-to-face courses

- Ensure there is clear project management methodology followed for all course production and development where created internally or via external contractors.
- Ensure the accessibility of materials is a key consideration in the design process and consider content in alternative formats where possible.
- Ensure the Trust's copyright of materials is upheld and that the Trust's materials do not infringe the copyright of other organisations.

Quality assurance

- Review and oversee the implementation of a quality assurance framework and processes, and ensure adherence, across Wiseradviser – including in individual course development.
- Identify, achieve and maintain appropriate accreditation/ approval/ endorsements.
- Keep abreast of developments in national qualifications for money advisers, advising the Head of Training and Consultancy of any gaps in provision and/or changes that are required in Wiseradviser training
- Oversee processes to manage course and service evaluation and drive achievement of quality targets

Tutor management

- Manage Wiseradviser tutors (external consultants). Ensure there are processes in place to regularly observe tutors and provide constructive feedback to them and the WA team to ensure continuous improvement and quality.
- Where course evaluations identify support/development needs for a tutor, produce a proposed development plan for the tutor. Discuss, agree and monitor this plan with the tutor.
- Manage the relationships with Wiseradviser tutors through regular communication and scheduled meetings. Ensure tutors keep abreast of developments within the Money Advice Trust.
- Ensure achievement of tutor performance targets.

Operational delivery

- Ensure achievement of targets of training places via face to face and online medium.
- Work with the Training Delivery and Operations Officer to analyse course attendance/ completion and other management information (MI) in order to prioritise improvement and promotional activity.
- Ensure TNA and evaluation MI feeds into production of materials, tutor management and quality assurance processes.
- Line-manage the Training Delivery and Operations Officer and the Learning and Development Officer.

Financial

- Ensure expenditure is within set budgets and approve expenditure (in line with authorisation limits).
- Produce financial reports for external funders and MAT's finance department.

Person Specification

Criteria	Criteria tested at		
	Application	Interview	Assessment
Qualifications- Essential <ul style="list-style-type: none"> ▪ Degree/ learning and development qualification or equivalent experience 	X		
Knowledge & experience - essential <ul style="list-style-type: none"> ▪ Cross departmental/partnership working ▪ Training delivery ▪ Writing and producing training materials ▪ Managing projects ▪ Report writing ▪ People management ▪ Stakeholder relationship management ▪ Influencing and negotiating skills 	X X X X X X X	X X X X X	X X X
Skills & competencies <ul style="list-style-type: none"> ▪ Analytical skills ▪ Self-sufficiency and reliability ▪ Budgeting skills and financial acumen ▪ Able to communicate clearly and effectively with staff, senior managers, trainees, tutors, partners and non-partner organisations ▪ Strong interpersonal and team working skills ▪ Willingness to travel within the UK ▪ Ability to take a partnership approach in planning and delivering services ▪ Strong, plain English writing skills and good attention to 	X X X X X X	X X X	

<ul style="list-style-type: none"> ▪ detail ▪ Computer literate with competence in MS office as a minimum 	<p>X</p> <p>X</p>		<p>X</p>
<p>Personal qualities</p> <ul style="list-style-type: none"> ▪ Credibility and Gravitas ▪ Understanding of/interest in the money advice sector ▪ Experience of working in the not-for-profit sector ▪ Positive, enthusiastic and full of drive ▪ Resilient ▪ To reflect the Money Advice Trust's values of being balanced, supportive and innovative. 	<p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p>	<p>X</p> <p>X</p> <p></p> <p>X</p> <p>X</p> <p>X</p>	<p>X</p>

How to apply

Please send your CV with a covering letter detailing how you meet the requirements of the job description and person specification to:

recruitment@moneyadvicetrust.org

or by post to:

Human Resources Department
Money Advice Trust
51-53 Hagley Road
Birmingham B16 8TP

The deadline for applications is **Friday 6th September**

Unfortunately we are unable to respond to applicants who have not been shortlisted.

Recruitment Timetable

Advert closes	-	6 th September
Interviews	-	Tuesday 17 th and Wednesday 18 th September

Terms and Conditions

Training and Development Operations Manager

Salary Circa £41k
Hours 35 hours per week. Flexible, however generally normal daily working times between 9.00 am – 5.00 pm Monday to Friday.

Benefits

Annual leave

- 29 days' annual leave per year, plus public holidays.
- Option to purchase or sell up to two days' leave.
- Duvet days – up to 1 day per quarter may be taken as short notice holiday, out of the annual leave entitlement.

Group Personal Pension Scheme

You are eligible to join the MAT Group Personal Pension Scheme. The scheme requires an employee contribution, which will then attract an employer contribution as follows:

Year of Service	Employee pension contribution	Pension contribution from the Trust
1 st year	3%	5%
2 nd year	4%	5.5%
3 rd year	5%	6%

(NB years two and three increases are optional – employer contributions are contingent on employees increasing their contribution).

Health and wellbeing

- At our Birmingham office – free onsite gym
- Eye Care – employees who habitually use visual display equipment (VDU) are entitled to a free eye test every two years, and for employees who require glasses specifically for VDU use are entitled to a voucher towards their glasses.
- Eligibility to join the BHSF (Birmingham Hospital Saturday Fund) health scheme. For a monthly fee dependent on the level of cover, employees may reclaim everyday health care costs such as dentist, optical and consultancy fees.
- Flu vaccinations – all employees are offered the opportunity to have an annual flu vaccination, provided by a trained nurse at the office premises.
- EAP scheme - employees and their families also have access to an external confidential support service available 24 hours a day, all year round. It offers advice on dealing with a variety of issues such as work, financial, family, marital and legal.

Family Friendly Benefits

- Enhanced Maternity Pay – The Trust tops up maternity pay to full pay for the first 13 weeks of maternity leave.
- Parental Leave (conditions apply)

Money Saving Initiatives

- Season Ticket Loan – employees can take advantage of buying an annual or half-yearly travel ticket through a season ticket loan which is repaid via equal deductions from salary.
- Each year during June, employees based in Birmingham have the opportunity to join the Car Parking Scheme. This is where Employees are able to purchase subsidised parking for the year, and the loan is then repaid via equal deductions from Employee's salary each month over twelve months
- Access to The Word, our Reward Portal, where you can obtain discounts on a wide range of high street shopping, holidays, days out and travel.

Life Insurance

- MAT offers a death in service benefit of four times annual salary payable to the employee's nominated beneficiary in the event of death.

Values Rewards

- Staff can nominate each other for awards for #livingourvalues through our 'Thanks' system and each quarter an award is made to an employee for being balanced, supportive or innovative. Vouchers will then be issued to winners.
- In addition to this vouchers are also awarded for other initiatives such as long service or full attendance.