

**MONEY**  
ADVICE TRUST

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BUSINESS  
DEBTLINE

NATIONAL  
DEBTLINE

WISER  
ADVISER

# Learning and Development Officer Recruitment Pack

Money Advice Trust

September 2018

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## 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; and improving the UK's money and debt environment through policy, research, innovation grants 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.moneyadvicetrust.org](http://www.moneyadvicetrust.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 web-chat. 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, (2017), we helped 140,500 people on the phone and a further 43,500 people through our webchat service. In addition there were 1,362,500 visits to the National Debtline website. 92% 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](http://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 web-chat. 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 (2017), we helped over 29,200 small businesses and self-employed people by phone, and a further 7,100 people through our webchat service. In addition there were 167,300 visits to the Business Debtline website. 92% 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](http://www.businessdebtline.org).

### WISER ADVISER

Wiseradviser provides training and support, online and face-to-face, to people who provide money advice in charities across the UK. Last year, Wiseradviser provided over 11,400 training places to 980 free-to-client organisations across the UK. 97% of people who use our training find that it has helped them do their job. Our generalist training is accredited by Skillsmark. You can find out more by clicking [here](#).



## 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](http://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."

## Learning and Development Officer Vacancy

London Circa 27.5K per annum *this includes London Weighting*

Birmingham – salary on application

Plus generous benefits

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 money advisers across the UK through our Wiseradviser programme through both face to face and online channels. We enable trainees to help people across the UK tackle their debts and manage their money with confidence.

An exciting opportunity has arisen for an experienced Learning and Development Officer to join our team. We are seeking a highly motivated and results focused individual to support us across a number of key projects.

This role will focus on the quality of our training offer, and will lead on the course review processes. You will work with debt advice organisations to coordinate the Wiseradviser in house training programme and assist in the maintenance of the Wiseradviser website/ LMS. Using your extensive debt advice experience, you will work on course development and review projects, ensuring our courses are up to date, accurate and provide high quality learning outcomes for advisers.

You will have experience in related roles, and live our values, by being balanced, supportive and innovative which are core to what we do and how we work together.

This is a permanent full time role.

To apply, please send a CV and covering letter to [recruitment@moneyadvicetrust.org](mailto: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](http://www.moneyadvicetrust.org).

**The closing date for applications is Wednesday 10<sup>th</sup> October, 5pm**  
**Interviews 18<sup>th</sup> and 19<sup>th</sup> October 2018**

*We will only use the data you supply to us in CVs or application forms for recruitment purposes. This data will be held for six months. For further information please refer to our Privacy Notice for Job Applicants, available on the vacancies page of our website, [www.moneyadvicetrust.org/whoweare/Pages/Working-for-us](http://www.moneyadvicetrust.org/whoweare/Pages/Working-for-us).*

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:** Learning and Development Officer

**Reports to:** Training & Development Services Manager

**Based at:** 21 Garlick Hill, London EC4V 2AU or Tricorn House, Birmingham

### **Job Purpose:**

To coordinate our free Wiseradviser training for debt advisers, enabling them to help people across the UK tackle their debts and manage their money with confidence.

- Coordinate face-to-face training and e-learning providing excellent customer service for advisers and tutors, with a focus on the on demand training offering
- Manage the regular process to update our face-to-face course materials, working with external Subject Matter Experts and improving materials design
- Develop and review technical content of e-learning and face-to-face-courses
- Coordinate the review process of accredited courses with Recognising Excellence for any courses updated as part of the annual calendar of updates
- Contribute to quality assurance and Learning & Development processes
  - Working with the Learning Managers to develop and review technical course content
  - Update course materials including proofreading and monitoring version control processes
  - Assist with the preparation and administration of on demand course delivery including preparing materials, taking bookings, updating the training database, ensuring materials are prepared and delivered, and coordinating tutors
  - General administrative tasks related to WA training planning and delivery

Collating reports and accessing information on the LMS when required

### **Key responsibilities and accountabilities:**

#### **Course coordination**

- Coordinate assigned courses including:
  - Booking tutors and venues
  - Checking trainees booked on to courses via the Learning Management System (LMS)
  - Printing and sending tutor packs.

- Liaising with tutors and venues to ensure the smooth running of events.
- Checking equipment in working order and sending to the venue (e.g. laptop and projector)
- Reviewing trainee and tutor feedback and raising concerns with Training & Development Services Manager
- Assist Training Delivery and Operations Officer in planning annual course programme, reviewing bookings and suggesting adjustments based on demand.
- Create training events on the LMS, ensuring all course details are kept up-to-date.

### **Production and development of learning materials**

- Manage the regular process to update our face-to-face course materials (this includes handbooks, PowerPoints, tutor notes, card games).
  - Coordinate the Subject Matter Experts to review the materials in line with agreed deadlines.
  - Work with Subject Matter Experts and Learning Managers to develop courses; reviewing and acting upon trainee feedback, and improving materials design.
  - Develop and review technical content for assigned courses, acting upon feedback from advisers and tutors, as well as legislative and technical changes.
  - Work with the E-learning Coordinator to finalise; formatting and proof-reading
  - Arrange printing for all courses.
- Update allocated e-learning courses using Lectora and Articulate (e-learning software)
  - Complete update in line with agreed timetable, and keep E-learning Manager up-to-date on any delays
  - When acting as technical reviewer, highlight any required or suggested changes to improve the learning outcomes for advisers.
  - Work with Subject Matter Experts and Learning Managers to develop courses; reviewing and acting upon trainee feedback, and improving course design.
  - Upload and test updated versions thoroughly on LMS.
- Manage assigned projects (e-learning and face-to-face) using set project management procedures and documentation to:
  - Work with Learning Managers to create a brief, including technical and accessibility requirements
  - For all projects when assigned as a technical developer or review, ensure the accuracy of all course materials ensuring good practice and legislative requirements are met.
  - Collaborate with all involved in the project, including Learning Managers, external subject matter experts and e-learning developers
  - Ensure the brief and timescales are adhered to
  - Work with Learning Managers to ensure that the learning is fit for purpose for the end users.
  - Coordinate the review of accredited courses when updated outside of the three year accreditation cycle.



- Work with Learning Managers to assist on assigned projects (e-learning and face-to-face) to make the courses as effective as possible.
  - Collaborate with all involved in the project, including Learning Managers, external subject matter experts and e-learning developers
  - Review and test e-learning, giving feedback on the design and content.
  - Finalise face-to-face materials, to improve design/ format and proof read
  - Organise course pilots and tutor familiarisation days.
  - Create training events/ e-learning on the LMS, and work with Marketing Coordinator on promotion.
- Analyse trainee feedback from face-to-face courses, updating the departmental monthly reporting spread sheet and use to inform improvement/production of materials.

### **Quality and Improvement**

- Support the Training & Development Services Manager with quality assurance and course improvement processes.
- Develop and implement a version control process and ensure that processes are monitored and adhered to.
- Ensure Wiseradviser courses are in line with current best practice in Learning & Development across the sector.

### **Other responsibilities**

- Coordinate annual residential tutor seminar.
- Assist with the maintenance and development of the LMS (creating and updating web pages using HTML code, keeping course information up-to-date).
- Capture suggested improvements for the LMS from users, partners and the Wiseradviser Team and propose relevant suggestions to the LMS provider)
- Answer telephone and email enquiries from advisers, tutors, venues and website administrators in Northern Ireland and Scotland partner organisations. This includes 1st tier support for the LMS.
- Maintain regular reporting statistics, using LMS analytics, and provide ad hoc reports as requested.
- Operate within agreed budget and finance procedures. Process invoices entering details into spreadsheet to monitor expenditure against budget.
- Provide cover for other members of the team in their absence.

### Person Specification

Criteria	Criteria tested at	
	Application	Interview/assessment
<b>Knowledge &amp; experience - essential</b>		
Experience working as a Money Adviser with expert knowledge of the debt advice sector in the United Kingdom	X	X
Ability to translate technical debt advice to plain English	X	X
Cross departmental/partnership working	X	X
Stakeholder relationship management	X	X
Experience of managing projects	X	X
Administering Learning Management Systems or database systems	X	X
Experience of managing suppliers	X	
Experience of working as part of a project team	X	
Experience of report writing	X	
Experience administering websites or Learning Management Systems	X	
	X	
<b>Knowledge &amp; experience – non essential</b>		
Experience managing the delivery of training	X	X
Experience of coordinating training events	X	X
Experience of managing suppliers	X	X
Experience of coordinating and maintaining e-learning courses	X	X

<b>Skills &amp; competencies</b>		
Strong interpersonal and team working skills	X	X
Willingness to travel within the UK	X	
Ability to take a partnership approach in planning and delivering services		X
Strong, plain English writing skills and good attention to detail	X	
Computer literate with competence in MS office as a minimum	X	
Analytical and problem solving skills		X
Inter-personal and strong customer service skills	X	
Computer literate with high competence in Microsoft Office	X	X
<b>Personal qualities</b>		
Understanding of/interest of the delivery of training programmes	X	X
Experience of working in the not-for-profit sector	X	X
To reflect the Money Advice Trust's values of being balanced, supportive and innovative	X	X

## 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](mailto:recruitment@moneyadvicetrust.org)

or by post to:

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

The closing date for applications is **Wednesday 10th October, 5pm**

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

# Recruitment Timetable

Closing date: Wednesday 10th October, 5pm  
Interviews: 18th and 19th October 2018

# Terms and conditions

## Learning and Development Officer

Salary	London Circa 27.5K per annum this includes London Weighting Birmingham – salary on application
Hours	35 hours Monday to Friday
Location	Birmingham or London (we have offices in each of these locations)

## Benefits

### Annual leave

- 26 days' annual leave per year, plus 3 days between Christmas and New Year, and 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:

- 1<sup>st</sup> year of employment: MAT pays 4%, employee pays minimum of 3%
- 2<sup>nd</sup> year of employment: employee can choose to stay as first year OR MAT pays 5%, employee pays minimum of 4%
- 3<sup>rd</sup> year of employment: employee can choose to stay as previous year OR if on 5% MAT / 4% employee terms, in second year they can choose MAT pays 6%, employee pays a minimum of 5%
- Subsequent years: employees have an annual opportunity to amend what they pay (MAT contribution would change as a result) within these limits.

### Health and wellbeing

- 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

- Childcare Vouchers – part of your salary may be ‘sacrificed’ in exchange for Vouchers. Within specified limits, these vouchers are non-taxable and exempt from National Insurance contributions, representing a saving for employees.
- Enhanced Maternity Pay – The Trust tops up maternity pay to full pay for the first 13 weeks of maternity leave.

## 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 recognition portal and each quarter an award is made to an employee for being balanced, supportive or innovative. Points can then be spent in our online catalogue.
- In addition to this points are also awarded for other initiatives such as long service or full attendance.