

MONEY
ADVICE TRUST

BUSINESS
DEBTLINE

NATIONAL
DEBTLINE

WISER
ADVISER

Training Delivery and Operations Officer – Part Time Recruitment Pack

Money Advice Trust

September 2019

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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; 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.”



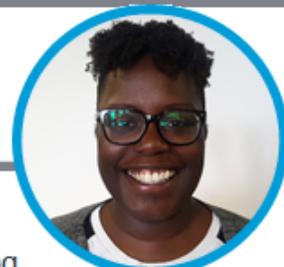
Dan, National Debtline adviser

“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 Delivery and Operations Officer – Part Time (21 hours per week)

11 month Fixed Term Contract – Maternity Cover

Circa £16K + 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 money advisers across the UK through our programme called 'WiserAdviser', through both face to face and online 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, the Training Delivery and Operations Officer will coordinate the logistical operations of our 'Wiseradviser' training. Along with our Learning Development team, the role will closely monitor evaluation data and management information in order to continually improve learning solutions, services and materials for advisers working or volunteering within our partner organisations across the UK.

The successful applicant will have significant experience of the operational delivery and administration of training; demonstrating a positive outlook with strong inter-personal skills, enthusiasm and resilience. You will have substantial experience of working within the learning and development arena and you will have worked with a learning management system; reporting and analysing management information. You should also have five years' 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.

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 13th September 2019

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 Delivery and Operations Officer (Part Time, 21 hours per week)
Reports to: Training and Development Operations Manager
Based at: 21 Garlick Hill, London EC4V 2AU OR Tricorn House, Hagley Road, Birmingham, B16 8TU

- To manage the operational delivery of our free Wiseradviser training programme for debt advisers. Enabling trainees to help people across the UK tackle their debts and manage their money with confidence
- To coordinate the logistical operations of Wiseradviser training, ensuring the smooth enrolment and delivery of training courses
- Support the administration of the Wiseradviser Learning Management System
- Responsible for management information (MI) within Wiseradviser
- Assist with production and development of learning materials

Operations Management

- Plan the annual programme of training courses (dates, locations, frequency of topics, allocation of tutors)
- General administrative tasks related to Wiseradviser training planning and delivery
- Collating reports and accessing information on the learning management system (LMS) when required
- Working with the Learning and Development Officer to coordinate assigned courses including:
 - Booking tutors and venues
 - Checking trainees are booked on to courses via the 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 Operations Manager
- Continually seek to improve the efficiency of all processes relating to Wiseradviser delivery, identifying potential improvements in work practices and escalating to the Training and Development Operations Manager as required
- Ensure expenditure is within set budgets and that invoices are accurate before signing for payment (in line with authorisation limits)
- Review monthly budget reports and inform Training and Development Operations Manager and Head of Training & Consultancy if amendments to the budget are required
- Respond to emails received to the shared inbox

Learning Management System (LMS)

Support the administration of the Wiseradviser LMS. Responsibilities include:

- Provide instruction and support to trainees
- Process new account registrations on the LMS, in line with eligibility criteria for Wiseradviser
- Work with the Learning Technology Manager to provide recommendations as to whether and how new LMS functionality should be utilised
- Work with the Wiseradviser team to periodically evaluate performance of the LMS, ensuring it is fit for purpose and providing value for money, and conduct procurement of replacement systems and negotiate with suppliers as required.
- Work with the Learning Technology Manager to ensure MAT staff and relevant partners are trained and supported on updates/additional functionality of administration of the LMS
- Continually seek to improve the efficiency of all LMS processes, identifying potential improvements in work practices and escalating to the Training and Development Services Manager as required

Reporting and management of information

- Ensure the departmental reporting spreadsheet is accurate and up to date, before sending to the Head of Training & Consultancy
- Regularly analyse feedback from Wiseradviser courses, and sector communication and insight, in order to inform improvement/production of materials, tutor management and quality assurance processes. Provide reports to the Training and Development Services Manager at agreed regular intervals
- Work with the Training and Development Services Manager to analyse course attendance/completion of management information (MI) in order to prioritise improvement/promotional activity
- Assist with other reports as required including quarterly reports for funders

Production and development of learning materials

- Support projects for new course development 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.

Person Specification

Criteria	Criteria tested at	
	Application	Interview
Knowledge & experience - essential <ul style="list-style-type: none"> ▪ Cross departmental/partnership working ▪ Stakeholder relationship management ▪ Experience of managing projects ▪ Experience managing the delivery of training ▪ Experience of managing suppliers ▪ Experience of coordinating training events ▪ Experience of working as part of a project team ▪ Experience of managing suppliers ▪ Experience administering websites or ▪ Learning Management Systems ▪ Experience of coordinating and maintaining e-learning courses ▪ Experience of report writing 	X X X X X X X X X X	X X X X X X X X X
Skills & competencies <ul style="list-style-type: none"> ▪ 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 detail ▪ Analytical and problem solving skills ▪ Inter-personal and strong customer service skills ▪ Computer literate with high competence in Microsoft Office 	X X X X X X X	X X X
Personal qualities <ul style="list-style-type: none"> ▪ Credibility and Gravitas 	X	X

<ul style="list-style-type: none"> ▪ 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></p> <p>X</p>	<p>X</p> <p></p> <p>X</p> <p>X</p> <p>X</p>
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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 13th September 2019

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

Recruitment Timetable

Advert closes	-	Friday 13 th September 2019
Shortlisting	-	W/C 16 th September 2019
Interviews	-	25 th and 26 th September 2019

Terms and Conditions

Training Delivery and Operations Officer – Part Time (21 hours per week)
PLEASE NOTE – this is an 11 month Fixed Term Contract - Maternity Cover

Salary Circa £16,000
Hours 21 hours per week.

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' tool and each quarter an award is made to an employee for being balanced, supportive or innovative. Vouchers will be awarded to winners.
- In addition to this vouchers are also awarded for other initiatives such as long service or full attendance.