



Volunteer Money Mentor

Volunteer Role Description and Purpose



The role of a Volunteer Money Mentor is to be part of our Community Money Advice team and work with clients to assist them with their debt or other money issues such as budgeting. Money Mentors listen, provide support, guidance and advice to help them improve assess and improve their finances.

Responsible to:	Team Manager
Supported by:	An experienced Money Mentor.
Location:	South Wiltshire

This post is subject to two satisfactory application, references and DBS check.

SWAN's Community Money Advice South Wiltshire (CMA) service offers free, confidential assistance to help clients resolve financial worries, learn to manage their budget, and break free of debt. Client appointments are normally held face to face in the CMA Centre with two Money Mentors, but they may be virtual or at another appropriate venue. Helping a client involves client appointments, gathering information, generating letters and carrying out necessary administrative tasks for the case.

Main Duties and Responsibilities of a Volunteer Money Mentor

- Agree dates and times of availability for client appointments.
- Conduct face to face meetings with clients at the Connect Centre, another appropriate setting or via virtual means as requested.
- Explain the role of Community Money Advice and how a CMA Money Mentor helps clients, discussing necessary policies, procedures, and processes.
- Work with clients to make a thorough analysis of their problems and concerns and input this into the CMA Case Management System – Catalyst
- Write up case notes, generate any required letters to clients, 3rd parties and any creditors and carry out any other administrative tasks required.
- Regularly engage with CMA Hub through the relevant IT system (Catalyst), or other methods.
- Support clients as they work through the agreed debt solution plan, as advised by CMA Hub, and help them to respond to correspondence/calls concerning the plan.
- Provide clients with the information and tools to enable them to make sound financial decisions in the future.

- To keep accurate and up to date records of each client meeting using an online client management system
- Review clients' situations as necessary.
- To always adhere to the organisation's Policies and Procedures.
- To operate within the codes of practice.

Equality and Diversity Statement

The Volunteer must at all times, carry out his/her responsibilities with due regard to SWAN's policies and procedures in particular; Health & Safety, Financial Authorisation, Confidentiality with regard to the Data Protection Act 2018 and all other relevant regulations.

Equality, diversity and inclusion are core to our values. In the selection of our staff and volunteers, we are committed to equality with regards to protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. We welcome applications from disabled people. The Volunteer must ensure a positive commitment towards equality by treating others fairly and not committing any form of direct or indirect discrimination, victimisation or harassment of any description and to promote positive working relations amongst employees, volunteers, suppliers and customers.

Organisational/Personal Responsibilities

- Complete a six-month Induction including all mandatory training required to undertake the role.
- After gaining an appropriate level of experience, to participate in relevant on-going training to keep up to date with services, procedures, guidelines, and legislation that affect the organisation and the clients who need the services.
- To take individual responsibility to alert the organisation to health and safety matters, and general organisational needs and issues.
- To attend regular team meetings/ briefings.
- To attend 6-8 weekly supervision as outlined in organisational policy.
- Agree with the Volunteer Manager and Team Manager how much time you can commit to the role.
- Set up and access SWAN emails and any other system such as CMA SharePoint, and check emails a minimum of once a week.

Skills and attributes

- Positive attitude towards disability, equality issues or social status.
- Professional/friendly approach.
- Ability to work as part of a team.
- Excellent communication skills, both verbal and written.
- Understand the importance of confidentiality.
- Methodical
- A reasonable level of numeracy and literacy

- Be honest and act with integrity.
- Able to work with computerised systems.
- Minimum 3 hours per week available to volunteer.
- Commitment to complete 2-day Community Money Advice training to qualify as a Money Mentor.

Benefits of Volunteering with SWAN

- The opportunity to develop new and existing skills and gain experience volunteering in a charity.
- The opportunity to meet new people.
- The opportunity to build a Personal Development Portfolio.
- The satisfaction of knowing you are making a vital difference to the people of South Wiltshire.
- Being part of an organisation, which has strong values and provides help and support to those most marginalised in society.
- Training and support through a thorough Induction and on-going support, advice, and guidance
- Out of pocket expenses reimbursed.