

## Job Description:

Video Debt Advisor



**Toynbee Hall**

For a fairer future Since 1884

<b>Job title</b>	Money and debt coach	<b>Location</b>	Toynbee Hall / Hybrid Remote / NHS Locations
<b>Department</b>	Debt Free Advice	<b>Length of contract</b>	FTC
<b>Outreach Work Required</b>	Yes	<b>Safeguarding level</b>	Enhanced
<b>Reporting to</b>	Advice Manager	<b>Direct reports</b>	None
<b>Working Hours</b>	35 hours / week	<b>Working Pattern</b>	Full Time

### About Toynbee Hall

Based in the East End of London since 1884, Toynbee Hall is a charity working alongside people facing poverty, injustice, and inequality to build a fairer East London. We provide vital advice and support, working in partnership to tackle unfairness and ensure everyone has an equal chance to thrive.

We have recently launched a new strategic plan which reinforces that our purpose is to build a fairer future with an end to poverty, injustice and inequality.

We work towards this by:

- Addressing poverty and injustice through advice and support and influencing systemic change.
- Shifting power to people and communities affected by injustice and inequality.
- Collaborating to end poverty and build fairer systems and institutions. What we want to see in the world starts with our community and our organisation.

This means:

- Working together to build a thriving local community where people have the resources they need, feel their voices are heard and are optimistic about the future.
- Being a good employer, where people are treated fairly, feel engaged and empowered, and work together to achieve our shared vision.
- Acknowledging the role Toynbee Hall has historically played in civic society while recognising that our role now is to shift power, to be an effective partner, and to amplify voices that are less likely to be heard.

What we learn from our work in east London we use to inform and influence wider policy – working to influence change in structures, systems and policies.

### Directorate background

The Advice Services directorate at Toynbee Hall is central to our commitment to address and alleviate poverty in London and beyond. Specialising in debt, welfare benefits, legal support, and generalist advice, our directorate has proven instrumental in significantly enhancing the financial wellbeing of those we serve. Last year alone, our efforts helped individuals and families to be over £23 million better off, showcasing the direct impact of our work.

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Our operational model combines direct service provision with a collaborative approach. We directly employ a number of advisors who deliver expert, impartial advice. Simultaneously, we lead a coalition of 15 partner charities—including local Citizens Advice Bureaus and law centres—where additional advisors are employed. This structure allows us to amplify our reach and effectiveness, ensuring that a comprehensive network of support is available to those in need.

By integrating direct support with strategic partnerships, the Advice Services directorate not only tackles immediate financial and legal challenges but also contributes to the broader goal of systemic change, enhancing economic security and community resilience across one of the most challenged demographics in the nation.

### Team background

The Debt Advice Team at Toynbee Hall provides crucial support to individuals and families struggling with financial burdens. Funded by the Money and Pensions Service (MaPS), this team delivers expert guidance and practical solutions to help clients manage and reduce their debt. The team's advisors are trained to navigate complex financial situations, offering tailored advice that empowers clients to regain control of their finances. Their work is vital in fostering financial resilience within the community, ensuring that individuals have the tools they need to achieve long-term financial stability.

### How we work

Our values are **Inclusive**, **Courageous** and **Empowering** and we expect everyone who works with us to work in a way that aligns with these values and to do their utmost to deliver our strategic objectives according to their role.

### Job purpose

As a Money and Debt Coach (Omni-Channel: Telephone & Video), your primary role will be to provide financial coaching and ensure that over-indebted clients receive tailored debt advice through various channels, including telephone, WhatsApp, and our network of video advice kiosks located in prisons, hospitals, job centres, town halls, and other community settings.

### Scope of role

1. Providing tailored financial advice and support
2. To maintain detailed case records
3. Keep up to date with legislation, policies and procedures and undertake appropriate training

### Key working relationships

This role will require close collaboration with various internal and external stakeholders to ensure effective delivery of debt advice services:

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- **Clients Seeking Debt Advice:**
  - Primary beneficiaries of the service, requiring tailored debt advice through video, telephone, webchat, and WhatsApp.
  
- **Internal Stakeholders:**
  - **Advice Manager:** Direct reporting line for guidance, performance reviews, and support.
  - **Debt Advice Team:** Collaborate with team members to share knowledge, strategies, and support complex cases.
  - **IT Support Team:** Coordinate for technical support related to video advice platforms and other digital tools.
  - **Training and Development Team:** Engage with for continuous professional development and keeping up-to-date with the latest debt advice practices.
  
- **External Stakeholders:**
  - **Community Organisations:** Such as prisons, hospitals, job centres, and town halls where video advice kiosks are located, to ensure smooth operation and client access.
  - **Financial Institutions:** For negotiating on behalf of clients and managing debts.
  - **Local Authorities:** For integration of services and support within the community.
  - **Other Advice Networks:** To share best practices and maintain high standards of advice quality.

## Key Responsibilities

### 1. Accurate, effective and individually tailored advice

- Deliver financial capability workshops at various NHS sites, promoting financial resilience and wellbeing.
- Provide money coaching advice through various channels including face-to-face, video, and telephone sessions.
- Complete assessments which lead to appropriate referral to an in house debt adviser
- Interviewing those that access the service using sensitive listening and questioning skills to allow them to explain their problem(s) and empower them to set their own priorities.
- Signposting/referring clients to internal and other agencies where required.
- Issuing foodbank vouchers.

### 2. Detailed case records

- Maintaining detailed case records, ensuring that all work meets all auditing and

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quality standards and the requirements of the funder.

- Ensuring all case records are written up in a timely manner.
- Monitor and report on client engagement and outcomes from advice sessions.
- Familiarity with CRM systems and practices (Customer Relationship Management system).
- Handle customer complaints, provide appropriate solutions within the time limits, follow up to ensure resolution.

### 3. Up-to-date training

- Completing a minimum of 16 hours of technical CPD accredited training or qualifying activity.
- Maintaining an up-to-date record of all training sessions.

### 4. Teamwork and Collaboration

- Work to an agreed work-plan, meeting targets and milestones, whilst prioritising and managing your own workload.
- Be an active member of the team, identifying opportunities for your own development, and demonstrating financial efficiency and value for money throughout your work.
- Compliance with Toynbee Hall policies and procedures, including health and safety.

### 5. Other

- Travel across London as required, and occasionally the UK
- Undertake additional tasks as delegated by DFA Management

## Person Specification

The successful candidate will demonstrate:

### Essential Criteria:

#### 1. Experience and Skills:

- Experience of conducting financial capability workshops and group sessions.

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- Experience in completing initial assessments via multiple channels including face-to-face, video, WhatsApp, and telephone.
- Hold a minimum of a Level 3 certification in debt advice
- Proficiency in IT and telephone skills, with the ability to use an online-based Client Management System (CMS).
- High standard of numeracy and computer skills, specifically with Microsoft Office Suite (Word, Excel, Access, PowerPoint, Outlook, MS Project).

### 2. Communication and Interpersonal Skills:

- Excellent written and verbal communication skills.
- Outstanding interpersonal skills with the ability to build rapport with clients.
- Ability to handle sensitive information confidentially and with discretion.
- Competence in giving and receiving feedback objectively and sensitively.

### 3. Personal Attributes:

- High level of professionalism and integrity.
- Ability to work independently and proactively without supervision.
- Capacity to remain calm and effective under pressure, adopting a “find a solution, no blame” attitude.
- Open-minded, inclusive, and collaborative approach, seeking fresh and alternative perspectives.
- Commitment to empowering others by sharing knowledge and enabling action.
  - Patience, empathy, willingness to help people and emotional intelligence.
  - Strong phone and verbal communication skills/ Ability to provide outstanding customer service.
  - Excellent active listening and problem-solving skills.
  - Tenacity to remain persistent throughout a difficult situation.
  - Customer focus and adaptability to different personality types.
  - Ability to multi-task, set priorities and manage time effectively.
  - Self-motivated and organised with a good internet connection and home set up for your working from home days.

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### 4. Commitment:

- Strong alignment with Toynbee Hall's mission, strategy, and values.
- Willingness to participate in training and develop further understanding in areas such as safeguarding.

### Desirable Criteria:

- Two years experience of delivering FCA regulated debt advice
- Ability to speak another language
- Experience of using Apple MacBooks
- Demonstrated history of various customer service channels such as face-to-face, telephone, email, video, and web chat
- Hold a Certificate in Money Advice Practice (CertMAP) from the IMA in partnership with Staffordshire University

### Further information

The role requires working from the Toynbee Hall office and working across sites as required.