

## Job Profile

**JOB TITLE:**

Money Guidance Specialist and Engagement Lead

**REPORTS TO:**

Money Guidance Service Manager

**JOB PURPOSE:**

The Money Guidance Specialist and Engagement Lead provides frontline money guidance and financial wellbeing support to GamCare service users through remote appointments delivered via telephone and video call. The role involves independently managing a caseload, delivering tailored, non-regulated money guidance, supporting financial wellbeing, and making appropriate referrals to regulated debt or specialist support services where required.

The postholder is responsible for maintaining accurate records, identifying risk and safeguarding concerns, monitoring outcomes, and delivering support in a sensitive, non-judgmental, and person-centred manner. The role also contributes to the ongoing development of the service through supporting staff knowledge, informing service improvements, and helping develop user-facing tools and resources to ensure interventions remain effective, accessible, and responsive to service user needs.

The role also leads on engagement and awareness activity relating to the Money Guidance Service, including developing and delivering presentations, training, and awareness sessions for internal staff, and external organisations and professionals, promoting understanding of gambling-related financial harm, referral pathways, and available support services, and supporting the development of effective partnership working across relevant agencies and stakeholders.

**DIMENSIONS:**

- To meet agreed targets for engaging and supporting new service users through the delivery of money guidance and financial wellbeing support.
- To provide ongoing tailored support through an agreed programme of follow-up sessions, promoting sustained financial wellbeing and positive outcomes.
- To meet agreed targets for developing and providing training to internal GamCare teams and engaging with external organisations.

**INTERNAL AND EXTERNAL CONTACTS:**
**Internal**

- Work collaboratively with Treatment and Helpline Teams to support effective cross-service work, including referrals, care planning, and feedback on interventions.
- Provide guidance, advice, and practical tools to GamCare teams on money guidance-related issues affecting service users.

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- Attend and contribute to relevant internal meetings and service discussions as required.
- Develop and provide training on the Money Guidance Service and how to make referrals to GamCare staff as required.

### **External**

- Work directly with service users to provide tailored money guidance and financial wellbeing support.
- Liaise with external organisations, including debt, credit, and other specialist support agencies, to support referrals and coordinate care for service users.
- Develop and deliver presentations to relevant organisations to raise awareness of the Money Guidance Service, GamCare's wider services, gambling harms, and available interventions.
- Attend relevant external meetings with partner and specialist organisations as required.

### **OVERALL ACCOUNTABILITIES:**

- Act as a lead caseworker for the Service, recognising the scope and limitations of the non-regulated money guidance offer and making timely referrals to regulated debt and specialist money advice services where appropriate.
- Independently manage a time-bound caseload of GamCare service users, including appointments, follow-up sessions, and call-backs, delivering tailored money guidance and financial wellbeing support.
- Develop and deliver outcome-focused interventions, monitor service user progress, and contribute insights, data, and reports on activity, outcomes, and emerging trends to support service development.
- Communicate effectively with service users and professionals using appropriate terminology and approved GamCare materials, while supporting the development of service user-facing resources and tools.
- Identify and respond appropriately to risk and safeguarding concerns in line with GamCare policies and procedures.
- Maintain up-to-date knowledge of gambling-related harm, financial wellbeing, and money guidance practices to support the delivery of effective and evidence-informed interventions.
- Work collaboratively with internal teams and individuals with lived experience to help inform and improve service user support and treatment approaches.
- Handle sensitive information securely and confidentially in line with GDPR, professional boundaries, and GamCare policies.

Date:

- Promote an inclusive, non-judgmental, and person-centred approach, demonstrating awareness and sensitivity to the diverse backgrounds and needs of service users.
- Design and deliver internal and external training and presentations on money guidance and gambling-related financial harm, including evaluating impact and improving content.
- Work with the Service Manager/team to review delivery and ensure training and presentation strategy remains responsive and effective.

## **Person Specification**

### **Essential Criteria**

- Experience providing money guidance, debt advice, or support to vulnerable individuals with complex needs.
- Experience managing a caseload and delivering tailored support in a remote or service-user-facing environment.
- Strong communication and interpersonal skills, with the ability to explain complex information clearly and empathetically, and to deliver engaging presentations and facilitation where required.
- Experience designing, delivering, and evaluating training and presentations to diverse audiences across internal and external settings (including voluntary, public, and private sectors).
- Ability to assess needs, manage risk, and maintain accurate records and confidential information.
- Strong numerical, organisational, and problem-solving skills.
- Ability to work independently and manage competing priorities effectively.

### **Experience & Knowledge**

- Experience working with vulnerable adults within social care, addictions, financial wellbeing, or related support services.
- Knowledge of safeguarding procedures, professional boundaries, and GDPR requirements.
- Understanding of gambling-related harm, addiction, mental health, or wider wellbeing issues relevant to the role.
- Understanding of the distinction between information, guidance, and regulated financial advice.

### **Qualifications**

- Relevant Money Guidance or Advice qualification, or willingness to undertake relevant training and professional development.

### **Skills**

- Ability to use budgeting tools, templates, and outcome-focused interventions to support financial wellbeing.
- Ability to maintain accurate case records and use client management systems for reporting and monitoring purposes.

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- Ability to build rapport with individuals from diverse backgrounds using a non-judgmental and person-centred approach.
- Ability to gather and share learning, insights, and feedback to support ongoing service improvement.
- Ability to act as a service ambassador, promoting the Money Guidance Service and building and maintaining effective external stakeholder relationships.
- Strong digital literacy with experience using Microsoft 365 applications (including Teams, Outlook, SharePoint, and intranet systems) to communicate, collaborate, and deliver remote services, training, and engagement activity effectively.

#### **Desirable Criteria**

- Experience working collaboratively with voluntary, community, and statutory agencies, including referrals and partnership work.
- Knowledge of the money guidance or debt advice sector, including relevant legislation, tools, and available support services.
- Experience using Motivational Interviewing or other psychosocial interventions to support engagement and behaviour change.
- Qualification related to training design and delivery, preferably for an adult and professionals' audience (e.g. PTLLS)

#### **Circumstances**

- Ability to work flexibly from home or GamCare office locations while maintaining confidentiality and GDPR compliance
- Willingness to work occasional evenings or outside standard working hours to meet service user needs.
- Ability to travel to meetings and service locations as required.

**To be noted:** This job description will be reviewed regularly. Any changes will be discussed with the post holder. This is not an exhaustive list of duties and responsibilities the post holder may be required to undertake other duties which fall within the grade of the job, in discussion with your line manager.

Date: