**East Ayrshire Citizens Advice Bureau**

**Job Description**

**Job Title:** Money Advice Admin Assistant  
**Reports to:** Operations Manager  
**Salary:** £25,000 per annum plus 5% pension contributions  
**Location:** Kilmarnock or Cumnock (with some flexibility for hybrid working)  
**Hours:** 35 hours per week

**Purpose of the Role**

The Money Advice Admin Assistant will play a vital role in supporting the delivery of East Ayrshire CAB’s Money Advice Service. The postholder will provide high-quality administrative and clerical support to ensure the smooth running of the team, enabling advisers to focus on client work. This includes managing initial early stages of Money Advice administration, client appointments, maintaining accurate case records, preparing reports, liaising with creditors and partner agencies, and assisting with the general administration of Money Advice cases.

The role requires excellent organisational skills, attention to detail, and a strong commitment to client confidentiality and quality service delivery.

**Key Responsibilities**

**Administrative Support**

* Provide efficient administrative support to the Money Advice team and Operations Manager.
* Maintain accurate electronic and paper records using the CASTLE case management system.
* Manage incoming and outgoing correspondence, including emails, letters, and phone calls.
* Schedule client appointments and manage the Money Advice diary system.
* Produce and distribute client information packs and standard correspondence.
* Prepare and maintain spreadsheets and reports as required for monitoring and evaluation.
* Support data collection and submission for funders and internal reporting purposes.

**Client and Partner Liaison**

* Act as a first point of contact for client queries related to Money Advice.
* Provide general information about the service, signposting clients appropriately.
* Communicate with external agencies, creditors, and referral partners as directed by advisers.
* Ensure all client information is handled sensitively and in accordance with data protection requirements.

**Service and Bureau Support**

* Contribute to the efficient running of the Money Advice service and the wider bureau.
* Support the Operations Manager with service administration, statistics, and reporting.
* Assist with the preparation of meetings, events, and training sessions.
* Undertake general office duties such as filing, photocopying, and ordering stationery.
* Participate in team meetings, training, and supervision.

**Quality and Compliance**

* Ensure all work meets Citizens Advice Scotland’s quality standards and audit requirements.
* Maintain confidentiality and adhere to all CAB policies and procedures, including GDPR and equal opportunities.

**Person Specification**

**Essential Criteria**

* Proven experience in an administrative or clerical role.
* Excellent organisational and time management skills.
* Strong attention to detail and accuracy in record keeping.
* Competent IT skills, including Microsoft Office and database systems.
* Ability to work independently and as part of a team.
* Excellent communication skills, both written and verbal.
* Ability to manage multiple tasks and meet deadlines in a busy environment.
* Commitment to the aims, principles, and values of the Citizens Advice service.
* Understanding of confidentiality and data protection requirements.

**Desirable Criteria**

* Experience of working in a money advice, welfare rights, or social justice environment.
* Knowledge of the Citizens Advice service and CASTLE system.
* Experience of working with vulnerable clients or in a client-facing role.
* Familiarity with reporting requirements for funders and charitable projects.
* Understanding of financial capability, debt processes, or welfare benefits.