



## Role Description

<b>Role Title:</b> Project Administration / Support Officer	<b>Reports to:</b> Project Administration / Support Lead
<b>Position type:</b> Fixed-term Contract	<b>Working Hours:</b> 21 This is a fixed-term contract until TBC
<b>Location:</b> Based in Stratford, London, E15 and some Remote working from home	
<b>DBS Required:</b> Yes	<b>Salary:</b> FTE (£27,200)

### Background

Money A+E is a Money Advice and Education social enterprise founded by a team of passionate money advisers. The organisation was created to provide simple, accessible and effective money advice and education to individuals and communities in need.

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### Our Vision

We believe that lives are transformed through Money Advice & Education.

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### Our Mission

To empower individuals by providing simple, accessible, independent and effective Money Advice and Education.

### About the Role

We are recruiting a **Project Administration / Support Officer** to join our team on a parttime basis (21 hours per week). This role plays a key part in supporting our operational work and ensuring clients receive timely help and guidance.

You will provide high-quality administrative support, assist with client triage, manage records and case databases, and help Money Coaches deliver effective services. The position is primarily based at our office in East London E15, with some flexibility for remote working.

We are seeking someone who is organised, reliable, confident working with clients, and able to maintain accurate and timely records. Ideally, the successful candidate will be able to **start immediately**.

## **Key Responsibilities**

- Conduct initial triage assessments with clients (face-to-face and by phone).
  - Assist clients with formfilling and completing basic financial statements.
  - Book clients for appointments with Money Coaches.
  - Update case information in our case management systems and monitor spreadsheets and email databases.
  - Communicate with clients by phone and email to provide updates or gather information.
  - Support Money Coaches during client appointments.
  - Carry out general administrative tasks (photocopying, scanning, creating client files, filing).
  - Signpost and refer clients to internal and external services.
  - Support the design and capturing of project data (outputs and outcomes).
  - Assist with ad hoc projects within the organisation.
  - Deliver internal training to team members and volunteers where appropriate.
  - Support and supervise admin trainees and volunteers as part of the team.
  - Organise and facilitate team and volunteer meetings.
  - Ensure compliance with organisational policies, Data Protection rules and health & safety requirements.
  - Maintain accurate records using IT and case management systems.
  - Contribute to social policy work, research and service monitoring activities.
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## **Person Specification**

### **Essential Criteria**

#### **Experience & Knowledge**

- Experience providing administrative support in a busy environment.
- Experience conducting client triage or initial assessments.
- Experience assisting clients with completing forms and collecting information.
- Experience using spreadsheets, databases or case management systems.
- Understanding of confidentiality, safeguarding and Data Protection responsibilities.

#### **Skills & Abilities**

- Excellent organisational and time management skills.
- Strong written and verbal communication skills.

- Ability to produce accurate administrative work including scanning, filing and photocopying.
- Ability to support colleagues, volunteers and trainees.
- Confident IT user (Microsoft Office and case management systems).

#### **Values & Behaviours**

- Commitment to Money A+E's values, mission and approach.
- Commitment to equality, diversity and inclusion.
- Professionalism, empathy and integrity when working with confidential information.
- Willingness to participate in supervision, appraisal and training.

#### **Other Requirements**

- DBS check (or willingness to obtain one).
  - Ability to work office based on **Monday and Friday**.
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#### **Desirable Criteria**

##### **Experience & Knowledge**

- Experience working in money advice, education or community support environments.
- Experience supporting project outcomes, data capture or monitoring.
- Experience delivering or supporting internal training.
- Experience organising or facilitating meetings.
- Knowledge of social policy issues affecting vulnerable communities.

##### **Skills & Behaviours**

- Ability to use initiative and problem solve.
  - Ability to support ad hoc organisational projects.
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#### **EQUALITY AND DIVERSITY**

We are committed to and champion equality and diversity in all aspects of employment with Money A+E. All employees are expected to understand and promote our Equality and Diversity Policy in the course of their work.

#### **PROTECTING OUR STAFF AND SERVICES**

Adherence to Health and Safety requirements and proper risk management is required from all employees in so far as is relevant to their role. All employees are expected to understand and promote good Health and Safety practices and manage risks appropriately.