Job Description and Person Specification
Transitions Money Advice Team Leader

Fixed Term Contract			
Salary:	£31,398 - £32,666 per annum, depending on experience.	**Place of Work:**	Hybrid working, home based with travel across West Devon and Torridge for home visits, outreach and community-based appointments.
Hours of Work:	37.5 Hours per week (Full-Time)		
Start Date:	ASAP		
End Date:	30th September 2027		
Reporting to:	Head of Advice Services		

Ready for Your Next Step in Money Advice?

Are you an experienced money adviser who is ready to progress, but has not yet had the opportunity to manage a team?

This role is an excellent opportunity to take the next step in your career. You may already be the person colleagues approach for support, enjoy sharing your knowledge or want to have a greater influence on service quality. You do not need to have been a Team Leader before. We will help you develop the leadership skills needed to succeed.

About Navigate Charity

Navigate is a registered charity providing free, confidential money and debt advice, welfare-benefits support and financial education across Devon and Somerset. We specialise in helping people who face barriers to mainstream services.

About Transitions

The Transitions service supports people experiencing financial hardship and complex life circumstances across West Devon and Torridge. Clients may be managing debt alongside poor physical or mental health, domestic abuse, relationship breakdown, disability, substance use or digital exclusion. We build trusted relationships and provide flexible, trauma-informed support at each client's pace.

About the Role

You will lead Navigate's delivery of the Transitions contract and support the advice team across West Devon and Torridge. The role is designed as a supported step into leadership: you will bring strong money-advice knowledge and casework judgement, while Navigate helps you develop confidence in supervision, coaching, performance management and contract delivery.

You will retain a small caseload of complex clients, so you can continue using your advice skills while gradually building your leadership experience. You will receive support and guidance from the Head of Advice Services, alongside appropriate training and regular supervision.

What You Will Do

Support and Develop the Team

- Provide regular supervision, reflective practice and day-to-day support.
- Help colleagues think through complex cases, safeguarding concerns and risk.
- Share your money-advice knowledge and encourage consistent, high-quality practice.
- Build a positive team culture where people feel supported, accountable and able to learn.

Maintain Quality and Client Support

- Manage a small caseload and provide regulated money, debt and welfare-benefits advice.
- Review casework and help ensure advice meets FCA, Advice Quality Standard, safeguarding and GDPR requirements.
- Oversee referrals and client journeys so that support is timely and coordinated.
- Make or escalate decisions about complex, urgent or high-risk cases.

Coordinate the Service

- Work closely with the wider Transitions and Wis£rmoney team and local referral partners across West Devon and Torridge.
- Monitor service activity, outcomes, quality and contractual targets.
- Contribute to reports, partnership meetings, audits and service improvement.

What You Need When You Join

- At least two years' experience delivering money or debt advice to people experiencing financial hardship.
- Experience managing complex casework and making sound professional judgements.
- Good knowledge of money advice, debt advice, welfare benefits and relevant regulatory requirements.
- The ability to explain technical information clearly and support colleagues constructively.
- Strong organisation, communication and partnership-working skills.
- An interest in developing others and progressing into leadership.

What We Can Do for You

We recognise that becoming a Team Leader is a significant career step. We will not expect you to arrive knowing every aspect of management. We will build on your money-advice experience and provide the support, training and opportunities you need to become a confident leader.

- Provide regular one-to-one support and guidance from the Head of Advice Services.
- Give you a structured introduction to supervision, reflective practice and appraisals.
- Help you develop coaching skills and learn how to give constructive feedback.
- Teach you how to delegate, oversee workloads and manage performance supportively.
- Support you to lead partnership meetings and communicate confidently across organisations.
- Teach you contract monitoring, performance reporting and how to use service data to improve delivery.
- Develop your quality-assurance and file-auditing skills and help you prepare for monitoring or inspection.
- Increase your leadership responsibilities gradually as your confidence and experience grow.

Desirable but Not Essential

- Previous line-management, supervision, mentoring or coaching experience.
- Experience of AdvicePro, contract monitoring or service development.
- Certificate in Money Advice Practice, DRO Intermediary status or a leadership qualification.

Other Requirements

- Full UK driving licence and access to a vehicle for business use.
- Ability to travel across West Devon and Torridge for home visits, outreach and community appointments and work flexibly, including occasional evening meetings.