

## ROLE ADVERT

**ROLE TITLE:** Financial Inclusion Officer

PERMANENT

**POST ID:**

**GRADE:** BAND F SCP 25 £22,434 – SCP 29 £25,694

**HOURS:** 18.5 Per Week

**LOCATION:** Usk

**WELSH LANGUAGE ASSESSMENT:**

(ch) Welsh language skills are not necessary.

**PURPOSE OF POST:**

Undertake a range of duties and responsibilities providing an effective customer focused service through strong partnership working and delivering a range of proactive solutions direct to the customer. This will include developing and implementing a financial inclusion strategy, working with partners and other agencies to maximise customer income as well as income for the Authority through Social Care charging and other welfare benefits as well as providing accredited financial advice and attendance at the County Court as and when required. The position will need to incorporate the prevention of homelessness and support affordability.

**Should you require any further information regarding this post, please contact:**

**Closing Date:**

**Please Note that we are not able to accept CV's**

**Application forms can be completed online or down loaded via:**

[www.monmouthshire.gov.uk/how-to-apply-for-council-jobs](http://www.monmouthshire.gov.uk/how-to-apply-for-council-jobs)

Applications may be submitted in Welsh, and that an application submitted in Welsh will not be treated less favourably than an application submitted in English.

Completed paper application forms should be returned to the following address:-

People Services, Monmouthshire County Council, PO BOX  
106, CALDICOT, NP26 9AN

Appointment to this post is exempt from Rehabilitation of Offenders Act and is subject to an Enhanced Disclosure Check.

Monmouthshire County Council is an equal opportunities employer and welcomes applications from all sections of the community.

All posts are open to job-share unless stated otherwise.

Monmouthshire County Council operates a Smoke Free Workplace policy

## **ROLE PROFILE**

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**RESPONSIBLE TO:**

### **WELSH LANGUAGE ASSESSMENT:**

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### **Who are we?**

Housing Options Team – Housing & Community Services

### **Our Purpose:-**

Investing in communities to enable them to build their resilience

### **The Purpose of this Role:-**

Undertake a range of duties and responsibilities providing an effective financial inclusion customer focused service that helps people to maximise their income, minimise their outgoings through strong partnership working and delivering a range of pro-active solutions direct to the customer. This will include developing and implementing a financial inclusion strategy, working with partners and other agencies to maximise customer income as well as income for the Authority through Social Care charging and other welfare benefits as well as providing accredited financial advice and attendance at the County Court as and when required. The position will need to incorporate the prevention of homelessness and support affordability.

### **Expectation and Outcomes of this Role:-**

- To work with customers and provide good quality focussed financial advice and assistance to ensure that all necessary steps and actions are undertaken to help people remain in their own homes and prevent potential homelessness.
- Provide budgeting support
- To accept benefits referrals from Social Care staff to maximise benefits for customers and also ensure income maximisation for the Authority through Social Care charging.
  
- To undertake home visits (wherever safe and practicable) with the customer to ascertain facts and to establish an action plan to maximise their income and assist in resolving potential homelessness.
- To maintain high levels of casework administration and update IT systems as directed.
- Develop and provide a welfare benefits, debt management and advocacy service for residents to assist with debt and financial difficulties, with effective signposting for specialist advice as required.
- Liaise with other agencies such as the Benefits Agency, utility providers, Housing Benefits section, CAB and where appropriate, assist with and attend reviews and appeal hearings at Court.

**Your responsibilities are to:-**

1. Liaise with Social Care staff to identify clients with potential benefit shortfalls.
2. Assist clients to guide them through the welfare system
3. Assist clients to obtain the benefits they are entitled through with practical advice and assistance in applications, and through appeals and tribunals.
4. Revisit client cases to ensure the identified benefit entitlement has been awarded, and pass this information onto the Income Assessors for charging purposes.
5. Through the provision of excellent financial advice, advise clients that are threatened with homelessness on accessing welfare benefits, grants, income maximization, budget management and liaise with lenders, financial institutions and other key organisations.
6. Maintain a record of clients cases and statistics in benefit entitlement, case status etc.
7. Keep up to date on the Welfare Rights system.
8. Provide training to staff, particularly Care and Housing staff, on welfare rights.
9. Identify and access alternative sources of financial support eg charitable and benevolent funds
10. Manage own workload and undertake any necessary training or development.

11. Help prevent homelessness
12. Support and participate any relevant partnership arrangements

**Here's what we can provide you with:-**

**What else you need to know.....Monmouthshire Values are:**

- Openness: We aspire to be open and honest to develop trusting relationships.
- Fairness: We aspire to provide fair choice, opportunities and experiences and become an organisation built on mutual respect.
- Flexibility: We aspire to be flexible in our thinking and action to become an effective and efficient organisation.
- Teamwork: We aspire to work together to share our successes and failures by building on our strengths and supporting one another to achieve our goals.

And this role, will work with Monmouthshire to achieve these.

**In addition:**

All employees are responsible for ensuring that they act at all times in a way that is consistent with Monmouthshire's Equal Opportunities Policy in their own area of responsibility and in their general conduct.

The authority operates a Smoke Free Workplace Policy which all employees are required to abide to.

## **Person Specification**

**How will we know if you are the right person for the role? As the successful candidate you will have demonstrated:-**

### **1. Education and Qualifications**

- Computer literate and familiar with computerised systems,
- Practical experience to include Microsoft Office i.e. Word and Excel
- Minimum GCSE Maths and English or equivalent
- Must have a full driving licence and have daily access to a vehicle
- Appropriate financial accreditation qualification

### **2. Experience**

- Ability to deal with sensitive issues
- Dealing with the public preferably face to face
- Knowledge of the Welfare Rights system that operates within the UK
- Understanding of Social Care issues

### **3. Competencies/Skills/Abilities**

- Ability to provide an effective and supportive environment for those persons experiencing personal difficulties and assessed as being in need of support.
- The ability to work with vulnerable adults including those facing financial difficulties.
- A thorough knowledge of Child Protection and POVA procedures including the relevant assessment framework.
- To have an empathetic and non-judgemental attitude to all people who require the service.
- Have an understanding of the issues around homelessness and the effects on the individual.
- To have a sound understanding of entitlements of welfare benefits and budgeting.
- To have sound knowledge of the introduction to welfare reform and the likely impact this will have on vulnerable households.
- Understanding of the issues facing financially excluded people and the ability to work proactively to help resolve their financial situation.
- Ability to work on their own initiative and as part of a team, planning and managing own workload within prescribed timeframes.
- Ability to promote and develop positive working relationships and negotiate with statutory and voluntary agencies to meet the needs of the individual.
- An understanding of statutory and voluntary resources that are available to support vulnerable individuals and families in order to prevent homelessness.

- Ability to undertake and complete various administration and relevant record keeping tasks as required.
- Participating in team meetings and regular supervision.

#### **4. General**

- Understanding of equal opportunities and anti-discriminatory practice and ability to adapt support services to meet identifies needs.

**Should you require any further information regarding this post, please contact:**

**Tel:**

**Closing Date:**