

## Financial Inclusion Officer

The Financial Inclusion officer will work with the team to provide Information, advice and guidance to ensure Newlon residents have the help needed to maintain stable long-term tenancies and live a good life.

The Financial Inclusion team provides support to address immediate crisis intervention, removing barriers to financial health and providing longer term support, enabling residents to achieve financial independence.

Team members will use a variety of methods to remove barriers to financial resilience including minimise expenditure, maximise income of applicants to the service using both welfare benefit, employment, and money management techniques.

The team offers support to address both the presenting issue and underlying causes, identifying a tailored pathway to increase household income in the longer term, so they are financially resilient.

The financial inclusion officers will work on behalf of residents, liaising with different departments ensuring resident needs are not just identified but the appropriate team are made aware of the issues and are addressing them.

You will work creatively to ensure the best possible outcome for residents, working with external partners where appropriate and making referrals to other agencies who are best placed to support the resident to achieve financial resilience.

Team members will be expected to develop relationships with a network of external organisations and partners to utilise appropriate sources of support relevant to address resident's needs.

The team will work to identify those residents who are vulnerable and ensure there is appropriate help in place to support them. Vulnerability for this team will have a wide definition and include those who have the potential to become vulnerable without support or intervention.

Where appropriate you will work alongside members of other teams to ensure the best outcomes available for residents.

## Person Specification

<i>What are we looking for?</i>		<i>How will we check if you have it?</i>
<b>Experience</b>	<ul style="list-style-type: none"> <li>• Minimum 2 years' (FTE) experience providing debt and welfare benefit advice to level 3, dealing with vulnerable people who may be at risk because of financial hardship.</li> <li>• Minimum 2 years' (FTE) experience of working directly with members of the public.</li> </ul>	Application form, Interview
<b>Knowledge and Skills</b>	<ul style="list-style-type: none"> <li>• Understanding &amp; experience of using of IT systems such as Customer relationship Management systems.</li> <li>• Up to date experience of providing welfare benefit advice, information and guidance on debt, employment support and financial inclusion.</li> <li>• Experience of supporting people with varying or additional needs with view to providing support to maintain financial resilience.</li> <li>• Understanding of how poor mental health can impact on people's ability to sustain their finance and the impact on tenancies and providing strategies to support residents to maintain their home.</li> <li>• Understand that other partners may be better placed to provide a service and are willing to undertake referrals and experienced in developing the appropriate external partnerships.</li> <li>• Understanding of safeguarding policies and principles.</li> <li>• Understanding of statutory and voluntary support available and how to access it.</li> <li>• Experience of short-term support intervention, focussing on clear achievable goals.</li> <li>• An understanding of how you can adapt the service you offer to meet the diverse needs of your customers.</li> <li>• An understanding of how to communicate the services provided to drive demand.</li> <li>• An understanding and experience of evidencing impact of your work.</li> <li>• Ability to work independently as well as a part of a team- ensuring that your work is recorded sufficiently to support this.</li> </ul>	Application form, Interview

<b>Core Competencies</b>	<b>Customer focus</b> <ul style="list-style-type: none"> <li>• You demonstrate a high level of customer care by working to achieve the Trust Newlon aims and objectives, by being Easy to Deal with &amp; providing Stable and Lasting tenancies.</li> <li>• Working in an advice setting to a set of KPIs.</li> <li>• Delivering a service to meet the diverse needs of our residents.</li> </ul>	Application form, Interview
<b>Core Competencies</b>	<b>Communication</b> <ul style="list-style-type: none"> <li>• You practise active listening and ensuring you understand and clarify requests; you communicate clearly, accurately and in a respectful, empathetic manner whether you are writing or speaking.</li> <li>• Work closely and collaboratively with Newlon customer facing teams to support residents to sustain tenancies.</li> <li>• Good written Skills - Able to communicate clearly with a range of stakeholders in writing and face to face.</li> <li>• You record notes in a timely manner to enable others to understand your work.</li> <li>• Experienced in report writing and data gathering.</li> </ul>	Application form, Interview, test
	<b>Working with others</b> <ul style="list-style-type: none"> <li>• You develop good working relationships with colleagues collaborating to support residents.</li> <li>• You are able to establish relationships with residents quickly and effectively.</li> <li>• You collaborate with external organisations working to deliver an excellent service.</li> </ul>	Interview
	<b>Planning and organising</b> <ul style="list-style-type: none"> <li>• You work systematically managing your workload to meet agreed deadlines.</li> <li>• You are able to help manage the teamwork streams and allocating work.</li> <li>• You prioritise your work to ensure resident deadlines are met.</li> </ul>	Interview
<b>Core competencies</b>	<b>Achieving results and quality focus</b> <ul style="list-style-type: none"> <li>• You take ownership of a task and stay with it until it is finished to a high standard and to the satisfaction of your customer.</li> <li>• Able to performance manage and coach to develop staff skills and the customer experience.</li> <li>• Able to coach and support residents to make the best decisions by supporting them to understand the options available to them.</li> </ul>	Applications form, Interview

	<p><b>Judgement and Decision making</b></p> <ul style="list-style-type: none"> <li>• You weigh up a situation and come to a decision that will meet objectives, maintain a positive image of Newlon and deliver Newlon's customer service standards.</li> <li>• You are able to objectively justify decisions made.</li> </ul>	Interview
	<p><b>Financial/Numeric Awareness</b></p> <ul style="list-style-type: none"> <li>• You are able to enter numerical data correctly, including use of benefit calculators and provide information based on the outcome.</li> <li>• You can provide information and guidance to residents with multiple debts.</li> <li>• Check invoices accurately and monitor expenditure against budget.</li> <li>• Manage spends within own area of responsibility.</li> </ul>	Application form, test
	<p><b>Influencing and negotiation</b></p> <ul style="list-style-type: none"> <li>• You use your expertise to guide others and convince them of the best course of action.</li> <li>• You are able persuade residents of the need for further action.</li> </ul>	Application form, Interview
	<p><b>Managing change and innovation</b></p> <ul style="list-style-type: none"> <li>• You welcome feedback and use it constructively to help improve the service and the way you deliver it.</li> <li>• You provide positive and constructive feedback when required.</li> <li>• Help shape this new role and adapt to change.</li> <li>• You can assess the advantages and disadvantages of a service and provide input to the service development and innovation.</li> </ul>	Application from, Interview