

Job Description

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| JOB TITLE: | Financial Inclusion Officer |
| LOCATION: | Newlon House, 4 Daneland Walk, London N17 9FE and other Newlon managed facilities |
| SALARY: | £36,499 per annum (pending pay increase in April 2024) plus eligibility to join our performance related pay scheme |
| REPORTING TO: | Financial Inclusion Manager |
| RESPONSIBLE FOR: | None |

Main Objectives

To respond and deal with referrals and self-referral applications from residents for help to the financial inclusion service, made through a variety of sources to progress residents' finances.

To address resident's initial crisis, including awarding hardship funds and support the resident to achieve financial stability while addressing the longer-term needs of the resident or their family.

To take ownership of individual enquiries, undertaking the necessary assessments, and combining them with robust decision-making to ensure the diverse needs of individual residents are identified and supported.

To work collaboratively across the service to address resident concerns and minimising any potential negative impact for both the resident and Newlon.

To provide specialised, relevant, and up to date benefit and money advice abiding by FCA rules, challenging incorrect benefit decisions, delivering a service to the highest standards. Ensuring that support is provided to beneficiaries in line with the procedures produced and that appropriate checks are in place to safeguard the fund.

To take responsibility for the whole of the resident journey ensuring residents receive the help they need in a timely manner and work to ensure that any gaps are addressed.

To carry out benefit checks, better off calculations, and assist with affordability checks at the request of the Assistant Director of housing in the event of handover.

Specific tasks and responsibilities

| | Key Tasks and Responsibilities | Performance Standards |
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| 1 | To provide comprehensive support to individual residents in a supportive and timely manner irrespective of the referral method. | <ul style="list-style-type: none"> • All referrals to the financial inclusion team e.g. emergency assistance requests, will be triaged with respect to their urgency and responded to as appropriate. • Referrals will include Financial support, debt information, welfare benefits, better off calculations and hardship fund requests. • All FI team members will support the housing team with their income recovery activities, including affordability tests, pre-action protocols and any other reasonable request. • Enquiries should be handled according to policy and procedure and in line with Newlon Gold and Trust Newlon principles. • All referrals will be responded to within two working days of initial referral and an initial assessment undertaken as part of that first contact. • All follow up actions will be identified with the resident and executed to a high standard, with the outcome recorded in both Dynamics and the Financial Inclusion Services Master Document. • All case recording and administrative tasks will be done in a timely manner in line with the requirements of the service. • All cases should be recorded on all reporting tools, including Dynamics and the Financial Inclusion Services Master Document to ensure ease of reporting and monitoring. • Feedback should be provided for the benefit of the residents, to enable reporting and support the services goal. • Any information provided to residents will be accurate and up to date, using reliable sources, if there is any confusion, clarity should be sought before the case is progressed. • A realistic assessment should be provided to residents to ensure reasonable expectations are maintained. • All information should be treated as confidential, and any information added or changed should be kept accurate and confidential in line with the data protection and business requirements. |

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| | | <ul style="list-style-type: none"> • All communication should be of a high standard. • Customer satisfaction is monitored, and steps taken to improve it. |
| 2 | Provide all aspects of Financial Inclusion support to residents in a way that meets their needs | <ul style="list-style-type: none"> • All residents should be offered a benefit check and provided with basic information and guidance on welfare benefits, Debt, and employment, up to advice level. This should include money management support and all aspects of Financial Inclusion. • All team members will be required to work within the appropriate legislative guidelines and are expected to keep their knowledge up to date. • Officers will ensure the income of residents engaging in the FI team is maximised for residents, including completing grant applications, behaviour and applications. • Residents should receive a holistic service that addresses all resident issues with Newlon, and the resident informed of what they can expect. • Team members should use the prescribed sources for information and highlight any training needs, both internally and externally, to ensure knowledge is up to date. • All information provided to residents will be accurate, consistent, and independent. • Team members should work collaboratively to identify trends and address them as a service, highlighting to other teams who may be impacted. • All work should be recorded as agreed, accurately and timely. • Undertake face to face support including home visits for residents who are unable to access offices. • Attend other departments team meetings to promote the Financial Inclusion service. |
| 3 | Process hardship fund applications | <ul style="list-style-type: none"> • To contact residents in potential crisis situations and undertake an initial assessment of need. • To make awards based on the assessment undertaken and any evidentiary requirements. • Undertake the necessary checks to ensure that funds are allocated fairly and uphold all the principles of fairness, in line with equality, and diversity requirements. • Make good evidence-based decisions, ensuring the policy and procedures are followed, and create the case on Dynamics to record the decision and justification for it in a timely way. • Be prepared to help challenging residents, in a supportive way, where applicable, again record the reasons and decisions clearly and succinctly. • Engage with other services to ensure the best outcome for the resident, addressing all relevant needs. |

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| 4 | Communication | <ul style="list-style-type: none"> • Team members will promote the service to all Newlon residents to ensure they are aware of the help available and how to access that support. • All team members will work collaboratively across the service to ensure that their residents receive the help they need. • Team members will be expected to participate in the planning and execution of different events across the service and promote them as widely as possible and will include resident event days. • Team members will positively promote the service to all Newlon teams and will attend staff meetings etc to engage and encourage referrals. • Team members will develop links with external partners to strengthen pathways to provide improved options for residents. • Team members will feedback to the team to improve the service and develop it's potential. • Team members will provide training to both residents and professionals in appropriate areas, providing workshops and courses in person and online. These may be out of office hours as appropriate. • Team members will attend and participate in regular team meetings representing the financial inclusion team. • Team members will attend and participate in external partner and resident meetings, representing both the financial inclusion team and Newlon Housing Trust. |
| 5 | Service delivery | <ul style="list-style-type: none"> • Newlon currently offer the opportunity to work up to three days at home (depending on the role and the needs of the business). • There will occasionally be evening and weekend work due to an event, staff will be asked to attend, and TOIL will be provided. • Financial Inclusion officers will be required to provide home visits as necessary. • All activities must be carried out in line with corporate policies such as those relating to Health and Safety, Equality and Diversity, Data Protection, and the Environment. • When one team member is unavailable the other team members will ensure their work is managed and actioned where appropriate, including holiday planning as a team. • All cases will have a clear next step plan within dynamics or will be marked as resolved. |
| 6 | | From time to time, you may be required to undertake tasks that are not covered by this Job description. |