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| Job Title | Financial Inclusion Advisor | Reports To | Duty Manager |
| Location: | Money Matters | Travel | Travel may be required |
| Level/Salary Range: | £22,000 - £27,000 per annum FTE | Position Type: | Full time Position |
| HR Contact: | Duty Manager/Operations Coordinator | Closing Date | 28 September 2021 |
| Applications Accepted By: | | | | |

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| email:recruitment@moneymattersweb.co.uk | Due to remote working we are not accepting applications by mail |

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| ORGANISATIONAL CONTEXT |
| Here at Money Matters, we are building an integrated, inclusive and best-in-class organisation. Our aim is to deliver a holistic financial inclusion service to our clients. The Advisor function is a key component in the effort to establish best in practice advice giving, working in close partnership with Operations, Admin, Support and Management Team.  The main focus of the Advisor is to deliver a financial inclusion/capability/energy service working at a level expected by the Scottish National standards to all service users.  The role will be to advocate on behalf of Money Matters clients to creditors, benefit authorities etc. and to provide an understanding of processes, court hearings, tribunals etc., and to support/represent through these processes if necessary.  **JOB SPECIFICATION**  **Role and Responsibilities**   1. To conduct interviews with clients by telephone, email or face to face in the Money Matters office or outreaches as required. 2. To provide a benefit check to ensure Benefit Maximisation as well as financial capability work 3. To provide guidance, information, representation and support in the areas of welfare benefits and money advice at up to Type 3 of Scottish National Standards.   3. To communicate effectively with third parties on behalf of the client.   1. To manage a case load and carry out detailed financial inclusion casework on the client’s behalf. 2. To sign post clients to other relevant specialist sources where appropriate. 3. To maintain accurate computer records in line with money matters procedures, and to ensure all client mandates are in place in line with GDPR. 4. To keep abreast of current legislation relevant to the Financial Inclusion sector and take responsibility for own personal development. 5. To ensure all benefit advice is delivered in line with quality standards/SNS. 6. To participate in any training or activities to improve advice practices and business processes. 7. To adhere to the policies and procedures of Money Matters. 8. Perform other related duties as required. |

**PERSON SPECIFICATION**

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| **POST OF: Financial Inclusion Advisor** |  | | |
| **ATTRIBUTES** | **ESSENTIAL** | **DESIRABLE** | **METHOD OF**  **ASSESSMENT** |
| **RELEVANT WORK/ OTHER EXPERIENCE**  Expert current knowledge of welfare benefits both from DWP and SSS  Experience of providing advice to clients face to face  Experience of providing advice to clients via telephone and email  Experience of identifying crisis/emergencies for clients  Experience of offering holistic advice  Experience of managing a caseload  Experience of effective signposting |                |  | Curriculum Vitae/interview & Assessment |
| **SKILLS AND ABILITIES**  Excellent literacy and numeracy skills  High level of Computer literacy  Experience of using Advice Pro  Ability to write clear and comprehensive case notes  Ability to manage caseload (review cases, update cases, identify and work to time scales)  Ability to perform manual benefit calculation |        |    | Curriculum Vitae/interview & Assessment |
| **PERSONAL QUALITIES**  Ability to work alone  Ability to work with colleagues  Excellent communication skills  Ability to work under pressure  Ability to prioritise work and manage crisis and emergencies effectively  Ability to keep knowledge and skills up to date and be motivated to do so |             **√** |  | Curriculum Vitae/Interview |

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| **ADDITIONAL JOB REQUIREMENTS**  Driving license  Flexibility/some evening work may be required    . |  |  |  |

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