

## Haemophilia Scotland Financial Wellbeing Officer Job Description

### 1. JOB IDENTIFICATION

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|------------------------------------|---|
| Job Title:                         | Financial Wellbeing Officer   |
| Responsible to (insert job title): | Director  |
| Grade:                             | NHS Band 5  |
| No of Job Holders:                 | 1 x 0.6 WTE   |
| Location:                          | Haemophilia Scotland Office at 15 Morningside Road, Edinburgh EH10 4DP with hybrid working. |
| Last Update (insert date):         | 15/01/2024  |

### 2. JOB PURPOSE

Work as part of the Haemophilia Scotland operational team to improve the economic wellbeing of our membership by delivering holistic advice and support on a range of financial matters.

Meet with Haemophilia Scotland's members on a one-to-one basis either by telephone, virtual or in-person to provide confidential advice on benefits and managing their finances to help improve the quality of life of people in Scotland living with bleeding disorders.

Build strong relationships with members, enabling them to make positive choices on financial matters and approach the organisation for support and advice when needed.

Provide education to members through workshops and online events to help raise awareness of financial wellbeing and assist in the production of literature and materials with up to date and accurate information on these subjects.

Develop an expert knowledge in the following areas to deliver a high-quality service to our members: Scottish benefits and their appeal process, budgeting, debt management and future planning.

Ensure the Haemophilia Scotland website and any literature are always kept fully up to date with the latest information on Scottish benefits.

### 3. ROLE OF THE ORGANISATION

Haemophilia Scotland is a Scottish Charitable Incorporated Organisation (SCIO) registered with the Office of the Scottish Charity Regulator (registration number SC044298). Our objectives are:

- To further as a primary objective the health, education, wellbeing, and the social and economic welfare of all those in Scotland with a bleeding disorder and their families.
- To further the health, education, and the social and economic welfare of the haemophilia and bleeding disorders community in Scotland and internationally, and in furtherance thereof:
- To bring together individuals and organisations that share such interests.
- Where possible, to cultivate reciprocal relations with organisations that have similar aims, relevant health, social welfare and educational objectives or which may otherwise support or benefit the Scottish Charitable Incorporated Organisation (SCIO).

### 4. ORGANISATIONAL STRUCTURE

The trustee board comprises up to 12 voluntary members elected by the membership or co-opted by the board.

The intended staff structure will comprise of:

Director (full-time 1.0 WTE)

Operations Manager (full-time 1.0 WTE)

Financial Wellbeing Officer (part-time 0.6 WTE)

*Administrative support (part-time up to 0.5 WTE) Part of 3-year Strategic Plan*

Accountant (contracted 0.1 WTE)

We additionally encourage volunteers to support our work.

## 5. SCOPE AND RANGE

The postholder is one of three senior paid officers within our organisation with the primary focus on the development financial support service we provide to our members. The postholder is seen as the principal contact with members on financial advice and provide information on the latest.

Effective communication with our members and others is an essential part of the role as regular contact with members, either in a private one-to-one format or in group discussions, will be required.

An important part of the role will be to keep up to date and accurate information of benefits and financial wellbeing for distribution to members via various communication channels.

## 6. MAIN DUTIES AND RESPONSIBILITIES

- Engaging with our members and performing a full and confidential benefit check to identify what benefits they would be entitled to.
- Assist with benefit applications and providing support and advice through the process.
- Support for making any appeals against benefits decisions.
- Update membership on latest benefits available in Scotland.
- Help and advice with budgeting and managing finances.
- Provide information both in-person and through organisation's website and social media about financial responsibility, future planning and debt management.
- To assist in production on educational materials on financial wellbeing which can be used at events and workshops.
- Host training and educational workshops at events or member gatherings on key financial wellbeing issues.
- Providing general advice on money issues such as setting up a bank account, using the internet to find best offers on purchases, energy advice and others.
- Maintain accurate and confidential records of work undertaken with members and comply with organisation's policies on data protection and safeguarding.
- Other duties which are consistent with the overall objectives of the charity.

## 7a. EQUIPMENT AND MACHINERY

On a regular basis the post-holder may have cause to use: -

Standard office equipment, including laptop mobile handset, and various software applications used by the organisation- Microsoft 365, Mail Chimp, Facebook, Adobe Acrobat, Zoom, Insightly membership database and WordPress content management system.

## **7b. SYSTEMS**

The postholder is responsible for compliance with Haemophilia Scotland policies and procedures.

For updating financial wellbeing information on website and developing information material for members.

Making regular report to Director on activity and performance.

Evaluation of financial wellbeing events and workshops and other related activities.

## **8. DECISIONS AND JUDGEMENTS**

The postholder will be responsible in developing and implementing a financial wellbeing program for members.

Make decisions on the most effective way to promote the new financial services to our membership and work with operational team on delivery.

Responds to incoming queries from membership on benefits and financial wellbeing matters.

## **9. COMMUNICATIONS AND RELATIONSHIPS**

The post holder will work with a wide range of individuals, most critical will be the Haemophilia Scotland membership where trust will need to be established as a matter of priority.

Communication will be predominantly by telephone, Zoom/Teams or face to face with individuals or at workshops/events.

Development with the operational team will be essential to ensure good working relationships within a small team.

## 10. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB

### Physical

- Use of keyboard/laptop for prolonged periods of time daily requiring concentration and accuracy.
- Office based in Edinburgh City, but travel may be required to other locations within the UK.
- Frequent use a mobile phone daily.
- Working remotely.

### Mental

- Use of empathetic skills on a regular basis in engaging with distressed members.
- Confidence in negotiation and advocacy on behalf of members in appeal process.
- Concentration required when handling data and completion of important documentation.
- Frequent requirement for prolonged concentration during attendance at meetings.
- Analysis of statistical information and remedial action.
- Frequent interruptions to planned work during the working day.

### Emotional

- Emotional impact of dealing on a regular basis with distressed/aggressive clients/public and others related to personal finances.
- Dealing with competing priorities.
- May be subject to verbal abuse.
- Postholder may be exposed to situations where members are distressed.

### Environmental

- Generally, within standard office environment/home but travel to other locations will be required.

## 11. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB

- Working in a small team with many varied demands.
- Ensuring that all aspects of the role are fulfilled, whilst prioritising critical issues.
- Building trust and confidence with members to support them over financial matters of a potentially sensitive nature.

**12. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB**

- At least at two years' experience delivering advice on welfare rights, money advice or future planning.
- Up to date knowledge of the Scottish and UK benefits and tax credit system.
- Experience of appeals to tribunal level.
- Experience of community engagement or working in a voluntary capacity.
- Experience of working with people with long term health conditions.
- Experience of developing and delivering training workshops on financial matters.
- Ability to meet deadlines, work to varying timescales and deal with numerous concurrent tasks.
- Ability to work on own initiative, make decisions and operate as part of a team.
- Computer literacy including Word, Excel, PowerPoint, Outlook, Teams, Zoom
- Experience of using client database systems to record and store sensitive information securely.

**13. JOB DESCRIPTION AGREEMENT**

**Job Holder's Signature**

**Date:**

**Supervisor's Signature**

**Date:**

Updated: 15/01/2024