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| <b>Job Family</b> | Delivery Front Line<br>Process<br>Knowledge  | Grade              | <b>7</b>         |
| <b>Job Title</b>  | <b>Financial Inclusion<br/>Officer – ASC</b> | <b>Directorate</b> | <b>Resources</b> |
| <b>Date</b>       | <b>September 2018</b>                        | <b>Version</b>     | <b>1</b>         |
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#### **Role Details Specific to Job Family**

These roles would be regarded as “front line” service delivery roles. Here, role holders are directly accountable for performance, often through the direct control of significant resources or through managed contracts. These roles may also deliver some of their results through collaborative working with co-producers or other third party agencies. At the lower levels, operational managers may oversee a department or team and at the lowest levels, direct contact with service users will be a common feature of roles in this job family. At the higher levels, they may be in charge of a department, large operational area or the management of significant contracts and may be ultimately accountable for ensuring compliance with statutory obligations

#### **Role Profile - Details Specific to Grade**

Working within established frameworks and procedures but with the freedom to apply professional judgement to solve problems. Roles will be a mix of supervisors and individual contributors. Work will be reviewed on an ongoing basis for fit with requirements. Roles requiring a level of process expertise to deliver an advisory or supervisory service

#### **Brief Description of job role and department**

The Shared Finance Service ambition is to add value, inspire success and this role is part of the Shared Finance Service (SFS) team collectively responsible for delivering SFS activities to realise this ambition. As the Financial Inclusion Officer Adult Social Care, the post holder will support the development and implementation of an integrated approach to financial inclusion, in line with the Council’s Charging Policy for Adult Social Care, Income Collection and Enforcement Strategies & policies. The role will enable ASC service users to build financial capability, maximise benefit entitlement and ensure the charges users are required to pay towards the cost of their services are affordable enabling them to cope financially to prevent poverty and social exclusion and, improve life chances.

#### **Representative accountabilities**

- Ability to understand difficulties faced by users of Adult Social Care , needing financial assistance,
- Ability to learn the DWP Performance Standards and locally agreed indicators / targets.
- Be fully conversant with the Council’s Charging Policy and the Statutory Guidance that underpins it
- Possess expertise in the area of Benefit entitlement as it affects users of Adult Social Care Services

- Deliver service activities and manage small caseloads under the supervision of more experienced staff
- Ability to ensure intended outcomes for customers and the Council are delivered within agreed service standards

**Budget Accountabilities**

None

**Specific Accountabilities**

**Functional Responsibilities**

- To proactively keep up to date with changing benefit entitlement affecting ASC Service Users
- Provide a high level of support & advocacy for users on the availability of various additional sources of income, including Attendance Allowance., Personal Independence payments Pension Credit and Employment and Support allowance etc.
- Provide the required assistance to ensure successful claims for these benefits
- Responsible for supporting Finance Manager & Finance Support Officers within the ASC Finance Teams with casework support & benefit advice
- Daily contact with customers (adopting a sympathetic but practical manner), who may be distressed and in difficult circumstances, to encourage them to discuss their financial difficulties and influencing factors
- Expected to lead and/or contribute to a range of projects and build relations with both internal and external partners in order to achieve specified outcomes.
- To act as an advocate to customers in order for them to appeal or challenge welfare benefit decisions
- To collate data and information and carry out analysis to produce trends, conclusions and recommendations
- To provide an access free benefit health check facility assisting customers with Disability Benefit Claims, Financial Assessments (including allowances for disability related costs ) appeals against underpayments of Benefits , investigating benefit sanctions and liaising with Revenues and Benefits staff where appropriate
- To make lone worker visit service to users to undertake benefit checks and complete claim forms as appropriate
- To assist service users in completion of financial assessment forms during home visits or elsewhere to ensure charges are made correctly in relation to the Council's charging policy for care services
- Maintain case notes on ASC and Finance information systems detailing outcomes of visits
- To carry out financial assessments to establish applicants' eligibility for assistance with care costs
- Inform service users of the rules governing the end of eligibility to such benefits as Attendance Allowance and Personal Independence Payments
- Keep up to date with legislation and guidelines issued by the Department of Work and Pensions, the Department of Health and implement accordingly.
- Provide advice on policies and procedures to service users (and their appointees), the general public, RBK colleagues and other professionals by telephone, letter and in person.
- To take responsibility for own performance, taking a proactive stance to ensure performance meets or exceeds standards required of the service.
- Arrange and attend surgeries and drop in clinics to ensure benefits are maximised and financial assessment forms are completed correctly

- Liaise with DWP to ensure service users financial assessment information is maintained with up to date benefit income
- Ensure users are advised of the council's charging policy and provide relevant information regarding policies and processes

### **Performance**

- Consistently achieves performance targets and celebrates success with team
- To develop, update and act on Personal Development Plans as discussed and agreed with the Adult Social Care Finance Lead
- To take responsibility for own performance, taking a proactive stance to ensure performance meets or exceeds standards required of the service. Partnership working

### **Partnership Working**

- Demonstrate strong support for the Shared Finance Service, inspiring team to deliver partnership working across both ASC and Shared Service Finance
- Communicates directly with external and internal customers to manage delivery priorities, issues and challenges
- Engage and maintain excellent relationships with the Care Managers, Welfare Benefits Unit, Legal Services and other RBK departments to ensure first class communication
- Develop partnerships with rent recovery, financial inclusion, and accounts receivable finance teams internal service, service providers including Kingston Centre for Independent Living Citizens Advice Bureau; And other Advocacy Groups.
- Establish referral links to agencies who can give practical support and legal financial advice. Actively engage in the organisation of meetings, workshops and other events as required

### **Person specification (knowledge, skills, experience and behaviours required in the role)**

#### **Education and/or Experience**

- A minimum of 5 GCSEs (including English & Maths) or equivalent
- Experience of working in a customer focused environment and achieving successful outcomes in areas such as financial assessments/money guidance/ debt /welfare benefit advice/ household budgeting or work in a similar finance field
- Knowledge of welfare benefits & planned welfare reforms e.g. Universal Credit

#### **Desirable Knowledge and Experience**

- Educated to Degree Level
- A minimum of 2 years' experience of money advice/welfare benefits advice / Financial Inclusion initiatives to a recognised quality standard
- Experience of being self-motivated and working within a busy, results-oriented and constantly changing environment
- Certification in Generalist Advice/Money Advice or equivalent certificate

#### **Capabilities and Behaviours**

- Strong performance management and leadership capabilities
- Able to understand and follow set procedures and legislation.
- Ability to develop strong working relationships and establish personal credibility with a wide range of stakeholders both within and outside of Kingston and Sutton Councils
- Enthusiastic and empathetic approach to coaching, mentoring and inspiring colleagues using high levels of emotional intelligence to achieve high standards of personal and team performance

- Creative approach to problem solving and improving delivery of finance services
- Open and adaptive approach to leadership, taking personal responsibility for achieving success for the Shared Finance Service
- Ability to clearly and effectively communicate verbally and in writing at all levels, with a good use of 'plain English'.
- Ability to monitor and calculate payments, with an ability to prepare & present stats
- Ability to communicate effectively with customers and understand their needs, often in emotional and sensitive situations.
- Empathy & a good understanding of the issues faced by customers, e.g. vulnerable people  
Team player – able to inspire confidence and respect
- Proven experience of using IT in a business environment, including Google applications, Agresso, Anite Word, and software packages to record and manipulate data and recognise the benefits and the potential of new technology
- Effective time management skills. Able to work effectively under pressure, organise priorities and in a 'lone working' environment
- Must be physically able to visit people in their own homes including properties that can only be accessed by stairs