

FALKIRK CITIZENS ADVICE BUREAU

INCOME MAXIMISATION/FINANCIAL INCLUSION ADVISER: JOB DESCRIPTION

Job Title: Income Maximisation/ Financial Inclusion Adviser

Hours: 35 hours per week

Fixed Term Contract: 31 March 2025

Salary: £24,989

Summary of role

The Income Maximisation/Financial Inclusion Adviser, will play a key role in the delivery of an independent, free, impartial and confidential advice, information and advocacy service, to Association standards, to assist vulnerable families and people, living in Falkirk, to deal with poverty related issues affecting their lives. The aim is to improve access to and the efficiency of financial health checks for vulnerable families and people, providing holistic financial inclusion and income maximisation advice in order to improve their financial circumstances.

Main responsibilities

The Income Maximisation/Financial Inclusion Adviser aims to provide the most effective service to suit the needs of the client.

- Assist in triaging all Bureau enquiries
- Undertake diagnostic interviews with clients by phone, face to face or video call to assess whether individuals are eligible to apply for benefits or to access other income maximisation support.
- Help with resolution of straightforward enquiries
- Signpost clients who can do more to self-help
- Refer to Session Supervisor for help with emergencies
- Provide information and advice on all aspects of Social Security Benefits.
- Carry out benefit checks
- To provide assistance with the completion of benefits forms
- Refer to Benefits Specialist for support with more complex issues
- Make referral to internal Benefits/Money Advice Teams or another appropriate agency
- Maintaining case records including detailed statistics
- Maintaining expertise in relevant legislation e.g. welfare rights and benefits
- Assist the Advice Service Co-ordinator in meeting the training needs of volunteer advisers.
- Ensure that financial gains are recorded appropriately.
- Ensure that Social Policy Feedback is provided to Citizens Advice Scotland as appropriate.
- Providing information for project reports
- Attending team and staff meetings as required
- To work within the aims and the values of the CAB service.

- To abide by health and safety guidelines and share responsibility for own safety and that of colleagues and clients.
- Carrying out other duties as specified by the Manager and required by the needs of the post

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the bureau management team.

Training

- Assist the Advice Service Co-ordinator in meeting the training needs of volunteer advisers.
- To attend meetings and training identified by Management team.
- Monitor changes in Social Security Benefits Legislation and attend internal and external training courses as appropriate.
- Ensure all personal training/development is kept up to date to meet requirements of job - Complete CPD training – 20 hours annually

Advice Work

- Conduct advice giving interviews with clients face to face, telephone, video or webchat
- Progress casework to completion – undertake research of case issues when required
- Provide support for the voluntary staff

Administration

- Ensure all cases are recorded fully and accurately, including client financial gains in CASTLE in accordance with bureau procedures and Quality Assurance/National Standards

Quality Assurance

- To work with management team and other staff to assist in the development of Quality Assurance within the Bureau and comply with Quality Assurance /National Standards policies

INCOME MAXIMISATION /FINANCIAL INCLUSION ADVISER - PERSON SPECIFICATION

E – Essential

D – Desirable

FINANCIAL HEALTH CHECK WORKER	COMPETENCIES
QUALIFICATIONS	<ul style="list-style-type: none"> Completion of accredited training to advice level (or evidence of competence through CAB ATP completion, relevant CPAG courses or Giving Good Debt Advice) E
EXPERIENCE	<ul style="list-style-type: none"> Telephone advice E Recent advice experience, social security benefits, welfare rights or debt counselling E Input to electronic case management systems D
SKILLS AND ATTRIBUTES	<ul style="list-style-type: none"> Ability to identify and respond to the communication needs of clients E Ability to work without close supervision, prioritise own work and meet deadlines E Ability to work as part of a team E Ability to communicate effectively, both orally and in writing E Ability to work hours flexibly as required by the needs of the service E
KNOWLEDGE	<ul style="list-style-type: none"> A sound working knowledge of social security benefits and entitlement E A knowledge of income maximisation strategies E A working knowledge of Microsoft software and related packages D An understanding of and commitment to aims, principles and policies of the service E
OTHER	<ul style="list-style-type: none"> A willingness to undertake training identified in collaboration with the Bureau Manager E The post is subject to the receipt of a satisfactory Basic Disclosure Certificate E The post is subject to the disclosure of criminal history information E