

**JOB** **DESCRIPTION**

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| **Job** **Title** | **Financial Inclusion Caseworker (In Partnership with Barnardo’s)**  **(CARF** **SCQF** **Level** **7)** |
| **Reporting** **To** | **Financial Inclusion Co-ordinator** |
| **Overview** | The Financial Inclusion Caseworker will deliver family centred support that enables families to have the skills that allow them to cope better financially, including assessing welfare benefit entitlement, providing budgeting assistance, access to debt relief, improving financial management and educating on banking and affordable credit.  The post holder will be expected to work evenings and weekend work, as required. |
| **Purpose** **of** **Job** | To support early intervention and prevention at the earliest possible stage to create a stable financial environment for families to develop by maximising income, addressing debt issues, assisting with budgeting and improving financial capability.  To develop, promote and deliver the service locally and represent CARF and the project as required to partners and outside agencies.  To contribute to operational improvements in the service alongside the Financial Inclusion Co-ordinator. |
| **Scope** **of** **Work** | Deliver and assist in developing the service including establishing effective working relationships with Barnardo’s project staff as well as other statutory agencies and voluntary sector organisation staff.  To maintain up-to-date skills, knowledge and experience in all key areas of advice and service delivery and demonstrate a high level of competence in dealing with complex cases and surges in demand.  Work intensively with families to improve their financial knowledge and awareness whilst also providing crisis debt advice and support.  Act as a role model for CARF’s values and actively demonstrate the elements of CARF’s STARS framework.  To actively promote the development of financially included individuals, households and communities.  Undertake any other specific duties that may be required |
| **Degree** **of** **Autonomy** | Work with families to maximise their income, assist with any indebtedness issues and help with budgeting enquiries.  Action any case work made by partner organisations and be responsible for the day-to-day management, maintenance and prioritising of own case load.  Develop effective working relationships with appropriate agencies and individuals to the benefit of the project.  To take individual responsibility for all aspects of service delivery within the remit, including quality and performance recording and monitoring, to ensure targets, outcomes and standards are met. |
|  | Identify and progress social policy issues relevant to the remit, and within current guidelines and processes.  Actively promote the development of financially included individuals, households and communities through individual work, group work, printed and electronic leaflets and through involvement at community events.  Recognise when and where to actively refer to other appropriate parts of the organisation.  Promote opportunities to overcome financial inclusion barriers including budgeting and other money management skills as well as access to banking, credit union and affordable credit services.  Create and deliver short presentations and talks on welfare benefits, money advice and financial inclusion issues, locally and nationally, to a variety of audiences, as necessary, and to provide training sessions where appropriate.  To act as an ambassador for CARF.  Collect and collate monitoring and evaluation data as required detailing project performance for presentation to the Financial Inclusion Co-ordinator and/or Service Delivery Manager.  Provide high level advice on a range of topics associated with financial inclusion including welfare benefit reform.  To identify your own personal strengths and weaknesses, including identifying personal training needs, and attending in-house and external training courses as appropriate.  To take responsibility for project referrals to/from partner organisations, participants, statutory agencies and voluntary sector organisations.  Undertake other duties as defined by the Financial Inclusion Co-ordinator or Service Delivery Manager as required. |
| **Processes** | Ensure accurate recording, progressing and monitoring of client cases using relevant software in accordance with recognised good practice in the advice field and internal procedures.  Ensure that appropriate manual and IT systems are correctly utilised for case managements, recording statistics, follow up work and quality control.  Adhere to CARF’s recognised good practice and standard processes and procedures to ensure case compliance at all times. |

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| **Quality** | Deliver the highest quality service by working within specified quality of advice and service standards.  Contribute to the development of quality processes and procedures associated with the project.  Ensure compliance with quality and statutory standards which requires maintaining a working knowledge of current local and national legislation, guidelines and key areas of advice.  To maintain expertise in relevant legislation. |

**PERSON** **SPECIFICATION**

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| **Knowledge** **&** **Understanding** | Evidence and/or qualifications at SCQF Level 7.  Demonstrable understanding of the aims and principles of CARF/CAB.  A sound working knowledge of social security benefits and entitlement, Universal Credit as well as knowledge of debt relief mechanisms in Scotland.  Understanding the need to manage information in a sensitive and appropriate manner.  Understanding of social policy related work and how to apply this in a work environment.  This post will require a PVG membership. |
| **Communication,** **numeracy** **and** **ICT** **skills** | Excellent communicator at all levels skills including the ability to communicate complex information in a clear and concise manner, including by telephone.  Effective interpersonal skills including experience of working with a variety of individuals with multiple and complex needs.  Ability to empathise with clients while ensuring required advice is provided, including directing clients to other sources of information and support.  Demonstrable knowledge of Microsoft Office application and a willingness to use a range of software applications on a daily basis.  Promotional and presentation skills and the ability to represent the organisation at events and meetings and publicise/market the service.  Able to work as a team player and communicate effectively with colleagues and managers. |
| **Generic** **Cognitive** **Skills** **e.g.** **evaluation** **&** **analysis** | Able to identify and resolve problems quickly and efficiently.  Good time management and organisational skills.  Self-motivated with a flexible approach to work. |
| **Autonomy and Accountability** | Able to work on own initiative, prioritise caseload and manage pressures both internal and external.  Assume ownership of the day-to-day delivery of the project. |
| **Applied** **Knowledge,** **Skills** **&** **Understanding** | Experience of working to agreed quality standards.  Awareness of the advice needs of the local community.  Flexible approach to tasks and a positive attitude.  Able to work within required statutory standards.  Clear understanding of the importance in service delivery.  Willingness to learn and develop new skills.  Awareness of current policy issues affecting communities, families and individuals in Fife.  Experience of partnership working, including delivering training and presentations to a wide range of audiences. |
| **Other** | Able to travel throughout the region. |
| **Values** **&** **Attitudes** | Commitment to CARF’s **STARS** values and associated behaviours:  o **Skilful** – CARF staff and volunteers are valued for their expertise and encouraged to increase knowledge through continuous learning.  o **Trustworthy** – CARF staff and volunteers are treated, and act with, honesty, respect and dignity at all times.  o **Aspiring** – CARF staff and volunteers show a desire and determination to make themselves and CARF the best they/it can be.  o **Reliable** – CARF staff and volunteers consistently aim to deliver the highest possible service.  o **Supportive** – CARF staff and volunteers work as a team to provide encouragement and support to each other, and to those who use our services.  For more detailed information relating to our STARS values, please refer to the document ‘**An** **Introduction** **to** **the** **CARF** **STARS** **Framework.’** |