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| CARF  SCQF Level 7 | Financial Inclusion Caseworker |
| Department & Location  Reporting To: | Money Advice Unit, Flemington Road, Glenrothes  Financial Inclusion Coordinator |
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| Purpose of Job | * The main purpose of the post is to support early intervention and prevention at the earliest possible stage and to deliver an effective and person centred service that enables people to have skills and knowledge that allow them to cope better financially and where necessary provide clients with debt relief options. This will be achieved by providing financial awareness training and literacy and financial health checks to project participants. * Deliver to appropriate locations throughout Fife as may be required. The post holder will be expected to undertake evening and weekend work when required |
| Competencies |  |
| Scope of Work | * As detailed in Degree of Autonomy. * To undertake any other specific duties that may be required. * The post requires an understanding of and application of preventative and early intervention actions, in order to avoid the need for crisis debt assistance and support, and to help reduce the level of financial exclusion for the people of Fife. There is an expectation that the post holder will possess and also maintain a good working knowledge of any legislation and good practice related to this field of work. |
| Degree of Autonomy | * Ensure that research work, telephone calls and/or correspondence relating to money advice and financial inclusion is progressed, recorded and filed appropriately and timeously and to ensure accurate recording, progressing and monitoring of client cases using computer software packages in accordance with recognised good practice in the money advice field * Develop effective working relationships with Fife Gingerbread Project Staff and other statutory agencies and voluntary sector organisation staff * The post holder will work with clients to maximise their income; deal with any indebtedness issues and help with budgeting enquiries and will action any casework in respect of money advice and financial inclusion in relation to referrals made by partner Organisations and be responsible for the day-to-day management, maintenance and prioritising of own case load. * To actively promote the development of financially included individuals, households and communities through individual casework, printed and electronic leaflets and through involvement at community events. * To promote opportunities for financial inclusion including budgeting skills and other money management skills such as access to banking and credit union services, savings and borrowing. * To undertake periodic short presentations and talks on money advice issues and financial inclusion issues to partner organisations and other audiences. * To provide financial health checks, awareness raising, income maximisation, presentations and also to attend and represent, on behalf of CARF, at various events, both locally and on occasion nationally. * To take responsibility for money advice referrals to/from project participants, statutory agencies and voluntary sector organisations. * To collect and collate monitoring and evaluation data and prepare a monthly report detailing comparative statistics and client financial gain for presentation to the Financial Inclusion Co-ordinator and/or Manager. * To identify and progress social policy issues relevant to the remit, and within current guidelines and processes. * Ensure systems are in place to collect feedback on what learners have learnt and be able to put this into practice. * Provide high level advice in a range of topics associated with Welfare Benefit Reform * There is an expectation that the post holder will possess and also maintain expertise in relevant legislation, case law and codes of practice etc related to this field of work. * To act as a duty adviser if required * To undertake other duties as defined by the Money Advice Manager or Debt Advice Co-ordinator as required by the exigencies of the service. |
| Processes | * Ensure accurate recording, progressing and monitoring of client cases in accordance with recognised good practice and internal procedures. * Collate statistical data, review and interpret performance data and submit regular written reports as required by management * To be responsible for all aspects of service delivery within the above remit, including quality and performance recording and monitoring, to ensure targets, outcomes and standards are met. * To provide regular written reports internally and for external funders as required. |
| Quality | * Adhere to CARF’s recognised good practice and standard processes and procedures to ensure governance and compliance at all times. * Contribute to overall efficiency and quality of processes and procedures. * 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. * Work within specified quality of advice and service standards |
| Skills | * IT Literate. * Customer Facing expertise * Excellent written, oral and communication skills. * Organisational/planning skills. * Person specification requirements are detailed in person specification document. |
| Knowledge | Understand aims and principles of policies and procedures and contribute to development and revision of these policies and procedures.  Identify and progress matters relevant to the remit and within current guidelines and processes.  Have and maintain expertise in relevant legislation, case law, codes of practice related to this field of work. |
| Personal Development | Identification of personal strengths and weakness, as well as identifying personal training needs. To attend in-house and external training courses as appropriate |