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**FINANCIAL INCLUSION ADVISER**

**Job Description and Person Specification**

Employer: Perth Citizens Advice Bureau

Job Title: Financial Inclusion Adviser

Responsible to:Money and Debt Lead (with accountability to Business Development Manager and Benefits Lead)

**Location:** Office based in Perth with travel to Blairgowrie Foodbank Outreach when required

**Hours per week:** 35 (Fixed term until 30th September 2025)

**Salary:** £25,405

## Summary of Main Responsibilities:

This role will provide an independent and impartial financial inclusion service for two groups of clients: clients who are in crisis and require emergency food provision and clients who are falling behind with rent and require support. With a focus on reducing poverty, maintaining tenancies and supporting people to have more control over their finances this will be a challenging role which will require effective prioritising and time management skills. Working closely with colleagues the postholder will ensure that clients are given a high-quality holistic service.

This is an evolving role so main responsibilities may be updated as the project develops.

**Main Responsibilities:**

1. Provide advice via a range of multi-channel methods including face to face, by phone, email.
2. Carry out income maximisation work including benefit checks and supporting clients to save on bills
3. Working on a rota with other colleagues provide support to those in immediate crisis
4. Support clients to manage their budgets by carrying out budgeting assistance
5. Liaise with colleagues in the debt team to ensure clients have access debt advice if required
6. Liaise with colleagues delivering fuel advice when required
7. Support clients with guidance on how to challenge benefit decisions
8. Liaise with foodbank and housing colleagues when we have the consent to do so
9. Ensure all client contacts are recorded within bureau guidelines including stats monitoring and comply with GDPR requirements
10. Carry out the required levels of training each year dependent on years of experience
11. Take part in wider bureau working groups to ensure strong team work and inclusion
12. Any other relevant activity as required by the Operations Manager or CEO

**Person Specification**

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|  | **COMPETENCIES** | |
|  | **ESSENTIAL** | **DESIRABLE** |

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| **QUALIFICATIONS** | n/a | n/a |

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| **EXPERIENCE** | Experience of working in the advice sector  Experience of managing a busy caseload within a high demand service  Experience of researching legislation and policy areas and translating it to clients | Experience of benefits casework  Experience of working for a CAB |

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| **SKILLS AND**  **ATTRIBUTES** | Effective communicator who can support clients to understand complex information  Good written skills  Effective time management skills, with the ability to prioritise in order to manage busy periods whilst maintaining a work life balance  Ability to build and maintain effective working relationships  Ability to prioritise client satisfaction  Ability to support vulnerable clients with complex needs  Ability to remain warm and approachable to all clients even when working under pressure |  |

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| **KNOWLEDGE** | Working knowledge of the social security system in Scotland  Good overall knowledge of general advice  Overall knowledge of how local authorities operate and their responsibilities towards their tenants and responsibilities towards eradicating child poverty. |  |

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| **VALUES** | Committed to continuous personal development  Non judgemental and impartial  Committed to the aims and principles of the CAB service  Supports a client centred approach |  |