



wdh
Job Description

Job Title:	Cash Wise Officer
Grade:	Grade 6
Section:	Financial Inclusion
Reports to:	Cash Wise Team Leader
Responsible for:	None

The Job

Is to:

- support WDH residents to maximise their income and become financially confident to enable them to maintain a healthy household.

The Bigger Picture

You will:

- advise and actively assist WDH residents on financial inclusion matters such as welfare benefit claims and income maximisation;
- provide a range of support to customers both face to face and remotely to help resolve a wide range of financial challenges;
- promote the service at community events to WDH residents and support at Cash Wise workshops where required;
- support the implementation of the Financial Inclusion Strategy and monitor progress of the action plan, and
- undertake any other duties appropriate with the overall purpose of the job and grade.

The Day to Day

You will:

- provide a comprehensive service for WDH residents to ensure full benefit entitlements are realised, to assist vulnerable people with benefit and grant applications primarily by way of home visits, with some workshop delivery and outreach events;
- work in partnership with Public Health as part of the Healthier Wealthier Wakefield Families initiatives and with other agencies/on other projects introduced in the future;
- work closely with the WDH Debt Team to provide support to WDH tenants with rent arrears and debts;

- submit appeal paperwork when appropriate to ensure customers receive full entitlement to benefits and access grants to reduce debts and improve the financial situation of WDH residents;
- promote and deliver financial inclusion initiatives to ensure people have the skills, knowledge and confidence to make informed financial choices;
- identify and promote initiatives to reduce fuel poverty including applying for grants to reduce utility debts;
- deliver and manage workshops with WDH residents of all ages and young people in schools to empower and educate them to better manage their money and their tenancies;
- support people to enable them to have access to an appropriate bank or credit union account;
- provide advice and assistance to WDH residents to access affordable credit and money management advice;
- work closely with the Community Employment Advisors and Wellbeing Caseworkers to ensure that opportunities for tenants to improve their employment prospects and wellbeing are maximised;
- work in partnership with external providers to improve the quality and efficiency of advice around welfare reform matters, employment assistance and financial support provided to all WDH residents;
- maintain good working relationships with external partners, including the local authority, Department of Work and Pensions and other statutory and voluntary agencies;
- keep up to date with changes to welfare benefit legislation and best practice, ensuring that WDH colleagues are kept informed;
- deliver training to front line employees on issues relating to Welfare Reform and financial capability to raise awareness and promote the service to all WDH residents;
- undertake effective communications at all times throughout all levels of the organisation and externally to promote positively the work of Cash Wise;
- manage effective systems, to accurately record and monitor processes, performance and quality assurance;
- promote health and safety to ensure safe working environments in line with our health and safety policies and procedures and undertake risk assessments where necessary required;
- ensure that all WDH policies are effectively undertaken especially having regard to equal opportunities, data protection and human rights;
- attend internal/external events and meetings, some of which may be outside normal office hours or may involve occasional evening and weekend work;
- have knowledge of our Vision and promote the values of the organisation at all times, and
- represent the wider team on a range of working groups, focus groups and inter-agency meetings as required.

This post is subject to an application for a Disclosure Barring Service check with WDH.

Personal Contacts:

Internal: Corporate Management Board, Financial Inclusion Manager, Debt Team, Finance Team, Community Employment Advisors, Mental Health Navigators Wellbeing Caseworkers, Managers and employees

External: DWP, Wakefield Council, Financial Inclusion Partnership, key partners, tenants and stakeholders

The Specifics

This section identifies the qualifications, skills and behaviours needed for an effective performance. Using these clarifies the personal qualities and workplace behaviours expected of the post. WDH principles reflect behaviour patterns which distinguish highly effective performance in a role. There are nine behavioural indicators which are split into three principles; Determination, Nous and Attitude and these are often referred to as DNA.

Personal Skill Characteristics	Essential (Tick)	Desirable (Tick)	Method of Assessment (Code list below)
Qualifications and Training			
A qualification at Level 2 of the Regulated Qualifications Framework such as GCSEs (3 or more at grades A-C/9-4), Award, Certificate or Diploma at level 2 or equivalent.	✓		AF/CQ
A qualification at level 3 of the Regulated Qualifications Framework, such as A Levels, Award, Certificate or Diploma at level 3 or Equivalent or willingness to work towards.		✓	AF/CQ

Determination			
Evidence of working to deadlines	✓		AF/I
Good understanding and experience of performance management	✓		AF/I
A good communicator, negotiator and motivator	✓		AF/I
Effective time management	✓		AF/I
A highly organised administrator	✓		AF/I

Nous			
Evidence of working within a financial inclusion, benefits or support setting	✓		AF/I
Good knowledge of Welfare Reform/Benefits and procedures	✓		AF/I
Clear presentation skills, verbal and written	✓		AF/I
Able to use PC applications effectively, such as Microsoft Teams, Word, Outlook, Excel	✓		AF/I
Able to demonstrate understanding of diversity and inclusion	✓		AF/I
Able to work collaboratively, to be mutually supportive and assertive in consulting others	✓		AF/I

Attitude			
Significant experience of communicating and working effectively in co-operation with a wide range of internal and external stakeholders	✓		AF/I
Able to demonstrate a commitment to learning and development initiatives	✓		AF/I

Additional Requirements of the Role			
The post holder must hold a current, valid UK driving licence and have access to a vehicle on demand.	✓		AF/CQ
The post holder will be required to work outside normal office hours	✓		I

Key

AF - Application Form

I - Interview (this may include a presentation and occupational test where appropriate)

CQ - Certificate of Qualification