

Job Description

Job title	Financial Welfare Officer
Directorate	BUSINESS : Business Support
Division	Finance – Benefits and Financial Welfare
Range	MPR 3
Reports to	Senior Financial Welfare Officer

Main purpose of the job:

As a Financial Welfare Officer, you will provide a high-quality front-line response to customer enquiries at a number of locations within the Medway area, relating to a whole range of services provided by the Council, more specifically the Benefits and Financial Welfare Service. The role will enable our customers to build financial wellbeing, improve their skills and empower them to financial capability.

Liaise with stakeholders in a way that promotes the [vision and values](#) of the Council.

Accountabilities and outcomes:

< Act as a first point of contact telephone and face to face enquires, undertaking rules-based assessment and eligibility checks, ensuring accurate information is obtained to ensure a full benefit check can be carried out.

Act as a caseworker for referrals and provide up to date money guidance and welfare benefits advice.

Identify and signpost customers to appropriate support services where appropriate.

To liaise and correspond with Government Departments, the Department for Work and Pensions, other appropriate organisations and other officers of the Council.

Compile accurate and timely notes of all contact in relation to customers, their representatives or other agencies and record them on the Council's system.

Support the process of improving the financial wellbeing of Medway residents

To provide support and identify collaborative working opportunities across the Benefits and Financial Service.

At the discretion of the Head of Service, such other activities as may from time to time be agreed consistent with the nature of the job described above.

Key Corporate Accountabilities:

To work with colleagues to achieve service plan objectives and targets.

To understand and actively keep up to date with GDPR responsibilities, including completing regular refresher training.

Safeguarding is everyone's responsibility: all employees are required to act in such a way that safeguards the health and well-being of children and vulnerable adults.

To participate in the Performance Appraisal process and contribute to the identification of own and team development needs utilising the Career Development Framework.

To actively promote the Council's Fair Access, Diversity and Inclusion Policy and observe the standard of conduct which prevents discrimination taking place.

To ensure full compliance with the Health and Safety at Work Act 1974, the Council's Health and Safety Policy and all locally agreed safe methods of work.

To fully understand and be aware of the commitment to the duty under Section 17 of the Crime and Disorder Act 1998 to prevent crime and disorder.

Promote the Medway Carbon Neutral by 2050 commitment; supporting the Council action plan to ensure we play our part in addressing the climate emergency.

Organisation:

This role reports to the Senior Financial Welfare Officer

The post holder will not be required to line manage others but may be required to direct, coordinate or train other employees.

The post holder will be required to liaise with all stakeholders both internal and external to the organisation.

Working Style:

HYBRID - a flexible working arrangement whereby an employee can undertake their work either in the office and/or partially or mainly from home on a temporary or permanent basis.



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Person Specification

All criteria at level A are considered essential unless stated otherwise.

Qualifications

Level A

- 5 GCSEs (including pass at English & Maths grade 4/C and above) or equivalent qualification
- Working towards completing Money Guiders Foundation and Tier 1,2, and 3.

Level B (in addition)

- Completed Money Guiders Foundation and Tier 1,2 and 3.
- Evidence of continued learning through DWP publications and CPD with money guiders

Level C (in addition)

Knowledge

Level A

- An understanding of the work involved within a financial services environment such as Revenues or Benefits, payroll, account reconciliation or a similar office environment.

Level B (in addition)

- A developed understanding of welfare benefits, Housing Benefit and Council Tax procedures
- Starting to understand the relevant legislation relating to welfare benefits and financial welfare.

Level C (in addition)

- A comprehensive understanding of welfare benefits, Housing Benefit and Council Tax procedures
- A comprehensive understanding of the relevant legislation relating to welfare benefits and financial welfare.

Experience

Level A

- Some experience of working within a local taxation, benefit, customer services or a similar office environment.
- Starting to gain experience in Revenue and Benefits systems

Level B (in addition)

- Demonstrable experience of providing comprehensive financial guidance to customers
- Experience of Independently managing own caseload ensuring that all cases are attended to and accurate, comprehensive records are kept.
- Experienced in explaining straightforward tasks to customers and colleagues, where required.
- Experienced in investigating and responding to initial complaints about the service.
- Starting to show experience of supporting other team members

Level C (in addition)

- A minimum of 3 years' relevant experience
- Experienced in dealing independently with complex cases, knowing when to escalate to managers.
- Demonstrable experience of explaining complex tasks to other customers and colleagues

Skills

Level A

- Basic customer care skills demonstrating the ability to be flexible and responsive to the needs of residents.
- Good keyboard skills and computer literacy. Ability to input data 'on-line' via PC
- Developing skills in providing advice concerning the administration of welfare benefits and financial welfare to customers.
- Able to develop the skills to accurately identify safeguarding issues and make appropriate referrals

Level B (in addition)

Qualifications

- Completed Money Guiders Foundation and Tier 1,2 and 3.
- Evidence of continued learning through DWP publications and CPD with money guiders

Knowledge

- A developed understanding of welfare benefits, Housing Benefit and Council Tax procedures
- Starting to understand the relevant legislation relating to welfare benefits and financial welfare.

Experience

- Demonstrable experience of providing comprehensive financial guidance to customers
- Experience of Independently managing own caseload ensuring that all cases are attended to and accurate, comprehensive records are kept.
- Experienced in explaining straightforward tasks to customers and colleagues, where required.
- Experienced in investigating and responding to initial complaints about the service.
- Starting to show experience of supporting other team members

Skills

- Demonstrates proficient use of the systems used within Benefits and Housing



- Demonstrates the ability to deal with increasing levels of work-related pressure, for example from deadlines, interruptions or conflicting demands.
- Demonstrates good customer care skills, demonstrating the ability to use judgement, and service regulations to assess financial situations and solve varied problems and/or develop short term plans.
- Ability to demonstrate an understanding of how teams work with other services and takes a proactive approach towards helping others.
- Competent in providing advice concerning the administration of welfare benefits and financial welfare.
- Able to accurately identify safeguarding issues and make appropriate referrals

Level C (in addition)

- Excellent customer care skills, demonstrating experience of adapting services, where possible, to meet customer needs and can take the initiative to work with other agencies/teams where necessary.
- Demonstrates the ability to cope well under considerable pressure and difficult situations, able to identify and act on own development needs
- Ability to confidently identify, where appropriate, different council services needed and be able to match these accordingly to ensure the best outcomes for Medway's residents.
- Able to provide advice to customers and colleagues on complex queries relating to the wellbeing of people.