Recruitment Profile

Post number	13769
Position title	Team Leader (Lead Officer Financial Support & Inclusion)
Grade	8A
Department	People
Location	Customer Advice and Support Contact Centre sites
Salary/Rate of Pay	£38,400.70 - £41,667.44 per annum
Hours of work	35
Weeks per year	52.1428
Number of staff responsible for	8
Reports to post number	Delivery Manager - Customer Services
Registration requirements	None
Drivers Licence required	N/A
Contract status	Permanent
Contract end date	
Reason for temporary vacancy	
Disclosure status	Level 1
Political restrictions	No
Role profile number	BSS 5S
Business World post status	Permanent
Work pattern	Monday to Friday 9am-5pm
Vacancy number	SBO10511
Closing date	18/11/2026

Role purpose

PURPOSE
To manage the day-day operations of the Financial Inclusion team to deliver high quality financial inclusion related services including, Discretionary Housing Payment awards and accounting and Scottish Welfare Fund teams assessment functions, outsourced advice and non-frontline welfare benefits/financial inclusion advice functions. To personally provide and maintain service wide operational technical expertise in financial inclusion matters and working with the Development team participate in providing a centre of excellence for the benefit of all staff including other senior managers.

PRINCIPAL DUTIES & RESPONSIBILITIES include,
1. Act as an lead on all matters relating to the administration and management of financial inclusion and specified related benefits including maintaining an expert knowledge of these areas and contributing expert advice in the setting and revision of related policies and strategies e.g. the Tackling Poverty and Achieving Social Justice Strategy.

Ensure the proper delivery of outsourced and third party contracted functions in areas including welfare advice and tribunals to maximise the benefits for the service and customers.

2. Assist the Delivery Manager - Customer Services in achieving performance and quality objectives including by setting team objectives and targets for staff, arranging the carrying out of monitoring and assurance checks and devising strategies for improving performance and quality. This includes related externalised functions and services funded through the Customer Advice and Support Service

3. Acting in collaboration with Development staff and subject matter experts provide expert corporate advice in the field of financial inclusion and specific programmes e.g. the Welfare Reform Programme whilst contributing to the development of policy initiatives and action plans with particular emphasis on reducing inequalities e.g. contributing to the implementation of the Tackling Poverty and Achieving Social

Justice Strategy whilst contributing to the Reducing Inequalities Strategy This includes ensuring corporately financial inclusion and welfare change impacts are identified and highlighted where to relevant departments for their consideration and action.

4. Assist the Delivery Manager - Customer Services with business planning including contributing to the formulation of policies and procedures, identifying the actions required to achieve the strategic aims and compliance with policies. Monitor progress and compliance and identify and implement remedial measures for areas of concern.

5. Assist in the maintenance and control of income related budgets and budgeting, ensuring procedures are in place to effectively monitor the distribution of funds and assist the Delivery Manager - Customer Services to monitor the service budget including overtime costs.

6. Manage all aspects of the Financial Inclusion Team including contributing to the control of service budgets

7. Working with Development and Systems staff, arrange preparation and delivery of information, guidance and training on financial inclusion , benefits and related issues to service staff and corporately and to external agencies when appropriate e.g. including contributing to PACE events.

8. Contribute to consultation exercises relating to financial inclusion, benefits and poverty related issues.

9. Contribute to the planning design and implementation of benefits awareness and take up campaigns working with Development and Systems staff and other service lead officers on the preparation and dissemination of related information to the general public and targeted groups.

10. Ensure appropriate management of casework, service provision and performance across the team including where appropriate by working with other Customer Advice and Support Service managers and supervisors to coordinate the activities of employees and the service, ensuring that work is prioritised and sufficient numbers are allocated to face to face customer contact, telephone enquiries and processing of enquires and service requests. Take timeous action to address issues identified.

11. Advise on and contribute to complex customer cases in line with government legislation including entitlements and appeals including the preparation of submissions for hearings or appeals and as required represent the customers at appeals and tribunals

12. Act as a liaison officer with external agencies and third parties e.g. The Department for Work & Pensions, Rent Registration Service, Registered Social Landlords, HMRC and other Local Authorities) establishing new arrangements and fostering and maintaining excellent existing arrangements

13. Undertake a full range of line management responsibilities, including recruitment, induction, attendance, performance and cases of discipline, grievance and appeals. Manage employees pro-actively and professionally in line with good human resource management practice and Council policies and procedures.

14. Manage the performance of individuals and the team on an on-going basis through the Council's performance management system in order to achieve high performance standards and motivated employees to meet targets. Deal with performance matters as they arise and where appropriate seek advice from the Delivery Manager - Customer Services.

15. Respond constructively to complaints, in line with the Complaints Policy and take action to improve the service to ensure that similar complaints can be avoided in the future. Deal with escalated queries

from Customer Service Supervisors

16. Provide expert technical advice and assistance to senior managers on queries, policies, consultations and legislative matters whilst participating in the creation and operation of a centre of excellence focused through the Development Team.

Person specification		
Criteria	**Essential**	**Desirable**
Education, qualifications and training	HND level qualification or equivalent in a relevant area, or Demonstrable relevant experience	An appropriate level of financial inclusion related qualification or SVQ level 3 A health or social care qualification
Skills, knowledge and competences	The Council has identified the following six essential core competencies for all Managers: 1. Leadership 2. Management of people 3. Financial management 4. Project management 5. Risk management 6. Knowledge of contract law Knowledge of Social Security and related law and practice. High level interpersonal skills and customer service. Good communication skills both oral and written. Good leadership skills, with ability to work on own initiative and as part of a team. Excellent numeracy skills. Computer literate with a good working knowledge of operating databases and the Microsoft Office suite of programmes. High level of organisational skills.	Good knowledge of Council Services and the wider financial inclusion landscape Good negotiating skills Project management skills
Experience	Substantial experience, in a welfare rights or financial inclusion environment. Significant experience of research and advice provision in financial inclusion and benefit matters Demonstrable experience in managing staff Experience in delivering financial inclusion awareness and take up campaigns Report writing and delivery Experience of working within and contributing to projects including	Experience of liaison with other Council and third party agencies Experience of preparing bid funding applications

	interagency initiatives Performance objective setting and delivery	
Other	Commitment to the provision of high quality customer service. Ability to deal with a varied workload and the demands of a busy office environment. Ability to adapt to new work practices. Ability to manage legislative, operational and system change on a regular basis and to motivate and organise staff to deal with the implementation of any such changes. Ability to deal constructively with sometimes difficult or demanding callers. Commitment to a strong team-working ethos. Commitment to continuous improvement within a performance management culture. Ability to think in a strategic and corporate context	

Driving Licence - Where it is an essential requirement for this post to hold a current driving licence. Note: If you have a disability which precludes you from holding a drivers licence, Scottish Borders Council will take into account its responsibility to make reasonable adjustments to allow for your disability. Should it be possible to make such an adjustment in order that you can undertake the travel responsibilities of the post, this will be taken into account in consideration for this role.

HEALTH & SAFETY STATEMENTS

To ensure the effective management of health & safety within the area of responsibility, for employees and anyone else affected by the work activities, through the implementation and compliance with health & safety policies, procedures and arrangements.

This profile is indicative of the nature and level of responsibility associated with the post. It is not exhaustive and the post holder may be required to undertake such other duties as may be required by the Workforce Planning & Development Manager to meet the needs and responsibilities of the Service and the Council.

Equality – Ensure that all work and outputs comply with and promotes equal opportunities and diversity.

Supervisory or Managerial posts only - Ensure that HR systems are in place for reporting management information and making recommendations for any corrective action necessary.

Equal Opportunities - Scottish Borders Council is committed to improving the diversity of its workforce to better reflect the communities we serve. We welcome applications from all minority groups and individuals who identify with one or more of the protected characteristics as defined by the Equality Act 2010. In particular from candidates who assess themselves as having a disability, under the Disability Confident Employer scheme this guarantees an interview to those individuals who meet the essential criteria of the post. All appointments will be made on merit.

Digital Innovation & Solution Focused Statement
Scottish Borders Council is committed to excellence and continuous improvement through the transformative power of digital solutions reinforcing our commitment to excellence, sustainability, enhancing our work practices and enriching our support to the community. As digital innovation evolves, our organisation is dedicated to integrating these advancements in a manner that aligns with our core values and strategic objectives.
All roles across the Council will actively seek and implement the latest digital solutions and technologies that can improve efficiency, productivity, and the quality of our services. Training will be provided, to ensure staff are proficient in utilising new technologies, fostering a culture of continuous learning and adaptability.

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Please note priority will be given to staff on the deployment/redeployment list who meet the essential criteria of the post.

Please note that applicants who have received early retirement/voluntary severance from Scottish Borders Council will not be considered.

TEMPORARY POSTS
If at a later date a temporary post becomes permanent, it will be at the discretion of the Department's management team to confirm the post holder as permanent without readvertising.

PRE EMPLOYMENT CHECKS

Essential

- Confirmation of Right to Work in the UK **- (All posts)**
- Level 1/Level 2/PVG Registration Disclosure Check - ***(PVG/Disclosure posts only)***
- References - ***(All posts***)
- Confirmation of qualifications required to meet the essential criteria on the person specification **- (All posts)**

Right to Work in the UK - To ensure that you are eligible to work in the UK, we will require the following documentation:

- A Passport showing you are a British/Irish Citizen.

  OR

- A British Birth/Adoption Certificate along with an official document containing your name and permanent National Insurance number

For all other nationalities

- Settled status code

  OR

- Immigration status document, for further information visit Apply to the EU Settlement Scheme (settled and pre-settled status) - GOV.UK (www.gov.uk)

Please note that a Short Birth Certificate and a Driving Licence are not sufficient to show your entitlement to work in the UK.

OTHER DETAILS

Disclosure/PVG Registration

Under the Rehabilitation of Offenders (Exclusion and Exceptions) (Scotland) Order 2003 to the 1974 Rehabilitation of Offenders Act (ROA) Scottish Borders Council are entitled to ask "exempted questions" that require applicants for certain positions to reveal their full criminal history.

This means that all details of criminal convictions, whether they are spent or not, must be disclosed to help the recruiting manager assess the person's suitability for a position of trust.

Disclosure

These "excepted professions" are set out in the Exceptions Order and include:

- certain professions in areas such as health, pharmacy and the law;
- senior managers in banking and financial services;

PVG Registration

Certain posts are considered Regulated Work with Vulnerable Children and/or Protected Adults, under the Protection of Vulnerable Groups (Scotland) Act 2007. Preferred candidates will be required to join the PVG Scheme or undergo a PVG Scheme update check prior to a formal offer of employment being made by Scottish Borders Council.

PVG/Disclosure Process

After the application is processed you will receive an email with a secure link to view the disclosure. You must share this with us to progress the recruitment process.

Teacher Posts in Catholic Schools

Certain posts are in a denominational school therefore candidates must seek Catholic Church approval when submitting their application for these posts. You should apply for RC Church approval at the same time as submitting your application form. Guidance and the relevant forms can be obtained at www.sces.uk.com/approval.html.

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Political Restrictions

Certain posts within Scottish Borders Council will be deemed Politically Restricted. If you are appointed to such a post the Local Government Officers' (Political Restrictions) Regulations 1990 provide that your terms and conditions of employment are deemed to incorporate additional provisions set out in the Schedule to the Regulations, a copy of which can be obtained from HR. Full details of restrictions will be provided in your application pack if you are applying for a Politically Restricted post.

**** From 1 April 2026 a Scottish Local Government Living Wage Rate of £13.52 per hour has been agreed. All employees recruited on a salary/wage less than the SLGLW rate shall receive a payment additional to their salary/wage in order that they are paid at the rate of £13.52 per hour. The additional payment shall count as pensionable earnings and be subject to deduction of tax, national insurance and pension where appropriate.