FALKIRK COUNCIL

make it happen
council of the future

Job Profile

Job Title:	Financial Inclusion Officer
Reporting to:	Senior Welfare Benefits Officer
Responsible for Line Management of:	N/A
Your Job is to:	A Financial Inclusion Officer empowers individuals to improve their financial wellbeing by providing tailored advice on welfare benefits and budgeting. The role focuses on income maximisation, supporting benefit claims, and offering practical budgeting advice. By addressing financial hardship, the officer plays a key role in reducing poverty, social exclusion, and inequality, ensuring that clients have fair access to essential support and greater financial stability.
Grade:	F

What you will do :

Job Specific Tasks

1. Provide advice on support available for Welfare Benefits and budgeting including benefits in kind (e.g. free bus travel/period products) up to Type 2 of National Standards
2. Identify appropriate benefits and assist with completing benefit forms
3. Identify wider support needs of individual customers and make referrals for appropriate support ensuring vulnerable customers are supported
4. Advocate on behalf of customers with partner organisations
5. Work in partnership with council services and external agencies to deliver a holistic support
6. Keep up to date with changes in legislation, and best practice through ongoing training and personal development.
7. Deliver advice through a mix of outreach, telephone, digital and home visit appointments to ensure service accessibility
8. Maintain accurate, confidential records using case management systems, ensuring compliance with data protection and quality assurance standards.
9. Leading an outreach initiative to identify and remove barriers such as low income, digital exclusion, language barriers, and lack of awareness, in order to increase engagement and take-up of services

Job Demands

1. You will be office based with travel between locations.

2. You will be required to plan and organise your own workload.
3. You will be required to deal with conflicting priorities and deadlines.
4. You will regularly be responsible for cash handling or processing financial transactions such as invoices
5. You will have excellent communication skills and regularly advise, counsel, negotiate and persuade others.
6. You will encounter individuals whose circumstances mean they are distressed because of their physical, emotional and/or mental health needs.
7. You may encounter individuals who do not agree with decisions made by the Council.
8. You will provide a front-line service to council customers.
9. You will assess the needs of individuals or groups.
10. You will apply and ensure adherence to regulations or Council policy
11. You will be required to provide advice, guidance or personal services to individuals or groups
12. You will be responsible for handling and processing information.
13. You will be responsible for moderately expensive equipment.
14. You must be mobile throughout the Council.
15. You will be required to use your own initiative.
16. You will be required to exercise sound professional judgement.
17. You will be required to maintain up to date knowledge of relevant legislation.
18. You will be required to maintain confidentiality at all times.
19. You will be required to work as part of a team.
20. You will be required to participate in a duty rota.

Health & Safety

1. Work safely and follow procedures.
2. Take care of own health and safety and that of others whilst at work.
3. Comply with the Council's Health and Safety Policy.
4. Help create and promote a positive health and safety culture.

Person Profile

Essential Education & Professional Qualifications & Memberships	Ideally you will have	How we assess this
• Excellent numeracy and literacy • HNC in IRRV Level 3 Certificate in Local Taxation, Welfare Benefit and Administration or equivalent • Gain/maintain PVG membership for working with Protected Adults	• Membership of HNC in IRRV Certificate or significant relevant experience	Application Form Interview Qualification
Essential Skills, Knowledge & Experience	**Ideally you will have**	**How we assess this**
• Organisational skills • Customer care skills • Analytical skills • Problem solving skills • Attention to detail • Relevant experience is required. • Ability to organise competing demands. • Experience of relevant legislation. • Experience in data protection legislation. • Experience using MS office packages. • Experience working in a front line customer service environment.	• Coaching skills • Mentoring skills • Presentation skills • Report writing skills • Experience working as part of a team. • Experience working with disadvantaged teenagers and adults. • Experience building relationships with external agencies. • Experience working in a Multi-disciplinary/partnership. • Experience working in a community setting. • Previous office administration experience. • Gaelic language skills	Application Form Interview
Falkirk Council Values & Behaviours		**How we assess this**
• Demonstrates behaviours which are consistent with Falkirk Council Values **(Responsive, Innovative, Trusted, Ambitious)**		Application Form Interview