

**Belle Isle Tenant Management Organisation** **Job Description**

**Job Title: Financial Inclusion Officer**

**Grade: C3**

# Belle Isle TMO - Mission and Aims

The postholder will be employed by Belle Isle TMO and will work towards helping Belle Isle TMO achieve its mission which is to Build a Better Future for Belle Isle. In addition the postholder will contribute to Belle Isle TMO’s aims which are to;

* Provide High Quality Services
* Help build a safer and stronger community
* Be a well-run Tenant Management Organisation

# Belle Isle TMO - Values

The postholder will support Belle Isle TMO’s core values which are;

* High standards of governance, accountability, leadership and probity.
* Working together sharing our skills, knowledge and experience, developing and nurturing each other in a supportive and inclusive environment, caring for one another and encouraging trust and mutual respect.
* Doing things to the best of our ability and providing the highest quality of service, aiming to do things right the first time, every time, undertaking regular monitoring against agreed targets, to provide a consistently improving service.
* Ensuring an atmosphere of respect, integrity, fairness and trust - At all times we will be open and honest with each other, treating people fairly, respecting our differences and challenging inappropriate behaviour through our agreed policies and procedures.
* Developing good communication that is clear, accurate and appropriate. We will actively listen to and value each other’s points of view and provide an environment where people are happy to share ideas and information in a variety of ways

**Belle Isle TMO - Service promise.**

The postholder will contribute positively to Belle Isle TMO’s Service promise which is to:

* always be as helpful as we can be;
* offer relevant, useful and accurate information;
* make sure we have a range of services and activities that meet service user needs;
* listen to service users and wherever possible, act on feedback;
* support service users to achieve their goals; and smile

# Overview of the job

To deliver financial inclusion and income management strategies, providing support, advice and guidance to customers where financial situations prevent them from paying rent and other essentials, and maximising income through various debt recovery processes.

# Specific Duties

1. To carry out personal financial health checks for our tenants.
2. To maximise the income of customers including analysis of individual customers income and expenditure to enable them to set up rent and debt repayment plans.
3. To apply for and negotiate alternative payment arrangements for customers in relation to creditors
4. To be responsible for the promotion of alternative sources of affordable credit and to work with local credit unions to raise awareness of the work they do and to assist in setting up and attend events for customers which promote financial inclusion and improve financial literacy making full use of the facilities provided at Belle Isle TMO Gate.
5. To deal with enquiries from tenants with regard to Benefit applications and to liaise with Leeds Benefits Service as required. This will include interrogation of the Academy benefits system to monitor benefit claims.
6. To assist tenants in the completion of benefit application forms and the verification of income details.
7. To provide customers with assistance in making applications to open bank accounts and credit union accounts.
8. To assist and support the Community Support Manager and in the development and implementation of the Belle Isle TMO strategies for tenant and community involvement;
9. To provide operational and day to day support for the GATE centre and the Rents Team.
10. To form part of ongoing cover arrangements for the day to day provision of Belle Isle TMO’s telephone and face to face reception services.

It should be noted that the above tasks are subject to occasional changes to incorporate other commensurate duties and responsibilities to organisational change/review and to assist flexibility. The duties outlined are not meant as an exhaustive list and will also comprise any other duties within the spirit of the post as specified by the Chief Executive and the Board.

# Person Specification

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| **Area** | **Essential** | **Desirable** |
| **Experience** | Of dealing with customers and internal and external agencies on a daily basis in sometimes difficult circumstances. |  |
| Of the range of services offered by support agencies, especially where tenants require more intensive support. |
| Of providing a professional customer focussed service with commitment to customer care. |
| Of general office routines and financial procedures. |
| Of working effectively as part of a team. |
| Of planning and organising own work effectively in order to ensure the achievement of objectives. |
| **Education and Training** | A detailed and working knowledge of the recovery of both current and former tenant debt, and the options available for debt recovery. | Knowledge of the operation of office  based IT systems including; CX, Academy, Abritasand Microsoft  Office packages. |
| Of Means Tested Benefits. |
| Of the Legal Procedures for recovery of debt or for breaches of tenancy. |
| General level of education with minimum 4 GCSE’s (grade A to C) or equivalent. |
| A willingness to take responsibility for own continuous development |
| **Skills** | Ability and confidence to communicate effectively with a wide range of people. | Ability to provide an efficient and |
| Ability to be sensitive to individual needs, show understanding and maintain customer confidentiality at all times. | Effective ability to provide information accurately and concisely to customers. |
| Ability to work on own initiative and prioritise own workload to ensure that deadlines are met. |
| IT skills |
| Good negotiating skills in potentially difficult situations. |  |
| Flexibility in approach to working hours and ability to attend evening meetings where necessary. |

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| **Area** | **Essential** | **Desirable** |
| **Values and** **Attitudes** | To uphold and promote the mission, aims, goals, service promise and values of the organisation. |  |
| To work closely with colleagues as part of a team in providing a professional service to meet the needs of the tenants and residents of Belle Isle. |
| To undertake any other duties, commensurate with the level and experience of the post holder, as may from time to time be required by the Chief Executive, to ensure service continuity, and for the benefit of the organisation as a whole. |
| Willing to take personal responsibility under and abide by Belle Isle TMO’s Health and Safety Policy and Equal Opportunities Policies in the duties of the post and as an employee |