



Tollcross & Shettleston Money Advice Service (T.S.M.A.S)

FINANCIAL INCLUSION CO-ORDINATOR VACANCY

Post: Financial Inclusion Coordinator
(FIC)

Salary: EVH Grade 7 PA22 – PA25
(£39,072 - £42,903).

Responsible to: Tollcross
Community Trust Board

Fixed Contract until 31st March 2025
35 Hours a week

GENERAL DESCRIPTION OF POST

The Financial Inclusion Coordinator (FIC) is the senior member of staff of TSMAS (Tollcross & Shettleston Money Advice Service) and plays a key role in establishing and guiding its' development as a valuable local resource.

The FIC will be responsible for the overall co-ordination of TSMAS and he/she will deliver, alongside the Financial Inclusion Assistant (FIA), debt advice and financial capability assistance to financially vulnerable and excluded residents.

The FIC gives day to day direction to the FIA and is responsible for maintaining records and collating statistical information in relation to the project and reporting to its funders, The Tollcross Community Trust board and both Housing Associations.

ACCOUNTABILITY

The FIC will be accountable to the Tollcross Trust Board of Directors through its delegated Employment Sub-committee.

PRINCIPAL DUTIES

Overall Project Coordination

1. To work alongside key Tollcross Trust Board and volunteers, Tollcross Advice Centre staff and volunteers and partner organisations to establish TSMAS as a valuable resource within the local community.

2. To provide overall co-ordination and day to day running of the service.
3. To give day to day direction to the TSMAS Financial Inclusion Assistant

Provision of face-to-face money advice service to financially excluded individuals and families.

1. To provide money advice to financially excluded individuals and families on a one-to-one basis.
2. Act for clients where necessary, drafting letters, budgets and financial statements and carry out any calculations as appropriate.
3. Negotiate with third parties as appropriate.
4. Assist clients with other related problems where they are an integral part of their case and refer to other advisors or specialised agencies as appropriate.
5. Maintain case records for the purpose of information retrieval, monitoring against project outcomes and report preparation.

Develop and deliver an effective volunteer advisor resource within the community and provide support to further develop the skills of existing voluntary advisors.

1. Carry out a skills audit of volunteers and develop and deliver a programme of training for existing and new volunteers.
2. Carry out a recruitment drive to identify new volunteer money advisors.
3. Provide one-to-one support to volunteer advisors

Develop and deliver a series of financial capability and inclusion workshops and tailored one-to-one sessions on the following:

1. Household budgeting – to include basic IT and internet tuition e.g. how to get best deals, internet banking.
2. Sensible borrowing and debt management - to include loan consolidation, awareness of affordable and unaffordable forms of credit, take up of bank accounts
3. Tackling fuel poverty (in partnership with Shettleston Energy Advice Project or G.Heat) to include how to access cheaper fuel tariffs, smart meters, energy efficiency products
4. Benefit entitlements to include full income maximisation check and benefit uptake, understanding and completion of forms

Miscellaneous

1. To be responsible for maintaining records, collating statistical information and monitoring against project outcomes.
2. To be responsible for maintaining links with the project funders, including written monitoring reports as required.
3. To take part in meetings to discuss funding applications, work alongside TheTollcross Community Trust Treasurer in regards to monitoring budget spend.
4. To liaise with and co-ordinate activities with partner organisations and delivery partners, developing clear lines of communication and setting up referral protocols to ensure service users receive the most useful and appropriate intervention
5. To prepare and deliver presentations to partner organisations and community groups as required
6. Any other duties appropriate to the post.

Criteria for post of Financial Inclusion Co-ordinator	Essential	Desirable
1. Education and Qualifications		
Accredited qualification in Welfare/Money Advise or working towards one		X
2 Experience		
Experience of providing money advice including experience of working with legacy benefits	X	
Experience of working with and supporting staff in the advice sector or wider third sector.	X	
Experience of working with disabled, vulnerable or challenging customers	X	
Experience of making claims, appeals and managing casework	X	
Experience in income maximisation, arrears recovery & debt management	X	
Experience of working in partnership with local, statutory & voluntary agencies	X	
Experience of applying for grants, e.g. community care grants or utility assistance		X
Experience of adhering to policies and procedures	X	
Experience of contributing towards policies and procedures		X
Experience of using AdvicePro		X
Experience in managing or supervising staff		X
3 Skills / Abilities		
Excellent verbal, written, communication and negotiation skills	X	
Excellent organisation, administration and time-management skills	X	
Ability to be empathetic and patient with people	X	
Self-motivated, enthusiastic and flexible attitude to tasks	X	
Ability to multi-task and handle working under pressure	X	
Ability to research and understand complex case law to support client appeals	X	
Ability to innovate and develop practical and effective strategies and solutions	X	
Proficient computer user	X	
Ability to work on your own initiative and as an effective team player	X	
4. Knowledge		
Understanding the importance of confidentiality	X	
Sound knowledge and understanding of all welfare benefits legislation	X	
Recent experience of preparing clients for First Tier Tribunals		X