

# Job title: Financial Inclusion Specialist

Line manager: Financial Inclusion Team Leader

Grade (if applicable):

Direct reports: N/A



## Role purpose:

At Peabody our aim is to improve the quality of lives for our residents. We are not just a landlord, we aim to empower individuals to change their lives and strengthen communities. The Financial Inclusion team is at the heart of this work.

Our values are to do the right thing, pull together, celebrate diversity, love new ideas, be kind and keep our promises and these will be the central to your work at Peabody.

Working closely with the Collections team and other teams from across the business, external partners and, tenants in order to navigate the welfare benefits system to maximise incomes and sustain tenancies. The focus of the Financial Inclusion team is to deliver a services that will improve people's lives for the better.

The aim of this role is to provide intensive benefits support to Peabody residents using all methods of communication. The intention is for a dedicated specialist to work to ideally prevent, but also reduce arrears through income maximisation and challenging inaccurate decisions.

## Key result areas:

- Maintain effective relationships with tenants/residents, all internal Peabody teams and external agencies by being visible, engaged and present at all times.
- Deliver excellent customer service using all relevant methods of communication by providing specialist benefits advice – across the full range of available state and local benefits from benefit checks and initial assessments to complex benefits applications, challenging incorrect decisions and providing tribunal representation where appropriate with the focus on income maximisation, reducing rent arrears to avoid debt and potential eviction
- Provide tenants/residents with excellent advice that is timely and accurate using relevant up to date resources, attendance at relevant training and briefings and accessing local advice networks.
- Running the Financial Inclusion duty line as and when required – taking phone calls, responding to emails and making relevant referrals
- Running regular drop-in sessions for tenants/residents at Peabody and outreach locations where appropriate
- Collaborate closely with Peabody colleagues across all front facing teams notably Collections, Tenants and Family Services, Wellbeing, Neighbourhoods, Customer Care Line and Communities to ensure early intervention with vulnerable tenants/residents and to share information and strategies to effectively support the clients we are working with.
- Manage a varied caseload of complex benefit cases through direct engagement, effective communication, maintaining accurate up-to-date records using relevant databases, NEC and CRM and reporting all achieved financial and non-financial outcomes.
- Support Peabody's Financial Inclusion team and wider Peabody in the delivery of operational plans which enable us to meet our targets and demonstrate our social impact and success in collaboration with internal Peabody teams and external agencies.
- Support your manager to present accurate and timely information, case studies, feedback and outcomes relating to your work and your team.
- Maintain the highest standards of personal and professional integrity and conduct, following the relevant policies on health and safety, data protection, equal opportunities etc.
- Follow Peabody Health and Safety policies and procedures to ensure, as far as is practicable, your own safety and that of others in the workplace.
- Carry out any other duties that maybe required within the purpose and grade of the job.

Version Date:

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**Success metrics:**

Advise and assist tenants with welfare benefit claim forms, challenging decisions where needed, and to provide holistic debt advice.

Carry out home visits to vulnerable tenants who require additional support and are unable to engage with us in any other way.

**About you:**

You will be committed to delivering excellent customer experience – you will embody and champion Peabody's values whilst fulfilling our service promises every day in the way you deal with clients, colleagues and external agencies

You will work collaboratively and effectively with all parts of the business to support Peabody's work while supporting clients to manage their rent accounts and sustain their tenancies

You will have up to date knowledge of welfare benefits and experience of associated casework

You will have the ability to represent Peabody tenants/residents in communication with benefit agencies and external parties including DWP, local authorities and charities

You will have experience of working with diverse audiences

You will understand the principles of budgeting with low income families

You will have excellent numeracy, literacy and IT skills

You will have the ability to maintain accurate records of customer cases

You will be responsible for developing your own knowledge and skills to meet current and future business needs

You will have experience in effectively engaging and influencing a wide customer base, including engaging with vulnerable customers and those that have perceptions of Peabody Service failure

You will have the ability to work independently, exercising good initiative and judgement

You will be a team player and collaborative colleague, able to bring insight to contribute improvement in service delivery

You will have proven time management and prioritisation skills

You will pay attention to detail and have the ability to work on a variety of tasks simultaneously.

You will have the ability to work under pressure and meet deadlines and targets

You will have commitment to the principles of equality, diversity and inclusion

**You will have:**

You will have a strong background of benefits and/or advice delivery work

Good written and verbal communication skills.

Experience of working successfully with people in either a voluntary or paid capacity in a customer focused environment.

Knowledge of social housing.

Desirable - Experience of working with Advicepro and Powerapps

Intermediate level computer literacy in Microsoft packages, including Word and Excel.

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