



THE ROYAL BRITISH LEGION

JOB DESCRIPTION

Job Title: Regional Benefits, Money and Debt Advisors Levels 1 & 2

This job requires a DBS check at Enhanced level with barred list for Adults.

Reporting to: Regional Lead – Financial Capability

Role Purpose: Provide advice to beneficiaries on the full range of welfare benefit and/or debt issues

Key Responsibilities:

Levels 1 & 2

- To provide a comprehensive community-based benefits or debt advice service to beneficiaries who are experiencing difficulties, advising on their legal position and all the suitable options available through a mixture of face-to-face, telephone and email interactions.
- Act for the client where necessary; drafting letters, undertaking complex benefit calculations, obtaining medical evidence and researching case law as appropriate.
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation, using the IT software provided.
- Ensure income maximisation through the take up of appropriate benefits and/or debt management.; identifying and advising on entitlement, and overlap, of other benefits
- Prepare and present cases to the appropriate statutory bodies and tribunals as appropriate.
- Manage referrals and ongoing caseload to ensure beneficiaries receive appropriate and timely support.
- Ensure clients referred receive a fully integrated and client centred service at all times, co-ordinated with other Legion programmes.
- Develop and maintain local contacts with agencies and charities associated with benefit issues. These will include Advice Agencies, MOD, DWP, NHS, Local Authorities, Service and ex-Service Charities.
- Provide advice, guidance, assistance and support to internal stakeholders, beneficiaries other agencies, associated with issues connected with benefit advice.
- Act as a local ambassador for the Moneyforce Project, delivering briefings and demonstrations to increase usage of the website and understanding of the principles of financial capability.
- To keep up to date with trends and changes in social security and benefits/debt legislation and best practice, including, where appropriate, for devolved administrations
- Liaise and work with local statutory bodies, national representatives and other organisations as appropriate.

Level 2 only

- To provide a comprehensive community-based benefits and debt advice service to beneficiaries who are experiencing difficulties, advising on their legal position and all the suitable options available through a mixture of face-to-face, telephone and email interactions.
- To prepare and deliver training, workshops and seminars on benefits and debt issues for a range of audiences including beneficiaries and Advisors.
- Prepare case submissions and tribunal representation in benefit and/or debt matters.

General

- The role will be based in a local area office, however you will also be expected to assist beneficiaries in their homes, community outreach locations and at tribunal locations as needed
- This role will involve regular travel with a requirement to work outside office hours as necessary.
- Any other duties as are within the scope, spirit and purpose of the job, the title of the post and its grading, as requested by the line manager or Head of Department/Division.

This job description reflects the current scope of duties and responsibilities of the role. The post holder may be asked, and is expected, to undertake any other duties commensurate to the grade of the post. As duties and responsibilities change and develop, this job description will be reviewed and may be subject to amendment.

GENERAL

- To work in accordance with The Royal British Legion's shared values of **Service; Collaboration; Passion; Excellence; Valuing our people** which underpins the fundamental beliefs and qualities of who we are and what we do.
- To implement the Equal Opportunities Policy into your daily activities.
- To be responsible for your own health and safety and that of your colleagues, in accordance with the Health & Safety at Work Act (1974) and relevant EC Directives, including reporting any health and safety hazard immediately you become aware of it.
- To work in accordance with the General Data Protection Regulations and Data Protection Act 2018; to ensure the correct reporting of data breaches, any changes to the processing of personal data which require a Privacy Impact Assessment and any requests under the Individual Rights provisions are reported to the Legion Data Protection Officer..
- It is clear that due to the nature of the role, the postholder will have access to material which is confidential. It is a condition of their contract of employment that they ensure that no confidential material is leaked from the department to unauthorised members of staff.
- Royal British Legion is an equal opportunities employer and positively encourages applications from suitably qualified and eligible candidates regardless of sex, race, disability, age, sexual orientation, gender reassignment, religion or belief, marital status, or pregnancy and maternity. Any hire is to work in accordance with the Equality Act (2010).

PERSON SPECIFICATION

CRITERIA	ESSENTIAL / DESIRABLE	HOW TO BE MEASURED APPLICATION/ASSESSMENT/INTERVIEW/CERTIFICATE
QUALIFICATIONS AND TRAINING		
Good standard of education to GCSE level or equivalent	E	Application/Certificate
Recognised training in advice work, e.g, Wiseradviser course, IAG Level 3 in Information, Advice and Guidance or Certificate in Money Advice practice	E	Application/Certificate
Associate Membership of the Institute of Money Advisors	D	Application/Certificate
Debt Relief Order Intermediary	Level 1 D Level 2 E	Application/Certificate
Accredited Membership of the Institute of Money Advisors	D	Application/Certificate
EXPERIENCE		
Demonstrable experience of providing advice on welfare benefits OR debt issues Demonstrable experience of providing advice on welfare benefit AND debt issues	Level 1 – E Level 2 - E	Application/Interview
Knowledge and experience of the full range of welfare benefits including rates, payments and calculations OR the full range of debt resolutions available Knowledge and experience of the full range of welfare benefits including rates, payments and calculations AND the full range of debt resolutions available	Level 1 – E Level 2 - E	Application/Interview/Assessment
Experience of managing and being accountable for own caseload	E	Application/Interview
Experience of working with IT packages, including Microsoft Office, case management systems and other bespoke software	E	Application/Interview/Assessment
Experience of undertaking complex benefit OR debt calculations and challenging benefit or debt decisions Experience of undertaking complex benefit AND debt calculations and challenging benefit or debt decisions	Level 1 – E Level 2 - E	Application/Interview
Experience of preparing case submissions and tribunal representation in benefit and/or debt matters	E	Application/Interview
Experience of providing financial capability advice/training	Level 1 – D Level 2 – E	Application/Interview
Working knowledge of the military community and UK veteran organisations	D	Application/Interview

SKILLS & ATTRIBUTES		
Ability to develop and maintain effective working relations with volunteers, other ex-Service and charitable organisations and government agencies	E	Interview
Understanding of issues of confidentiality	E	Interview
Ability to relate to but maintain professional detachment when dealing with Beneficiaries	E	Interview
Effective as member of a team but also able to work independently	E	Interview
Flexible and ready to adapt to changing demands	E	Interview
Empathy with mission, objectives and values of TRBL	E	Interview

SHARED VALUES AND BEHAVIOURS		
<p>Service</p> <p>We support and serve. We are compassionate. We provide great customer care to all the people who come into contact with us. We are accountable and act with integrity.</p>		Interview
<p>Collaboration</p> <p>We value working together and with partners to achieve shared goals. Through strong communication and support, we build trust with each other and treat everyone with respect and honesty.</p>		Interview
<p>Passion</p> <p>We are passionate about our role and contribution. With a positive outlook we are resilient and committed to our work.</p>		Interview
<p>Excellence</p> <p>We strive to be the best we can. We are effective and efficient. We are bold. We are open to new ideas and approaches, challenge each constructively and are willing to learn.</p>		Interview
<p>Valuing our People</p> <p>We support, encourage and provide opportunities for all our people – ensuring we recognise and value everyone's contribution.</p>		Interview