



**Creative Support Ltd, Head Office**

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**Financial Inclusion and Welfare Rights Officer**  
**Head Office, Stockport**

**Reference: 77755**

Thank you for your interest in the above post, please find the specific role requirements and duties for this post detailed within this document. When completing the application form you may submit additional documentation however we cannot accept a CV as a completed application.

**Closing Date: 15 May 2025**

Once you have submitted your application form allow *7 working days* after the closing date for a response. Please return the application form by email to [recruitment@creativesupport.co.uk](mailto:recruitment@creativesupport.co.uk) or by post to Recruitment, Creative Support, Head Office, Wellington House, 131 Wellington Road, Stockport, SK1 3TS.

We are very much looking forward to receiving a completed application from you.



## **JOB DESCRIPTION – Financial Inclusion and Welfare Rights Officer**

**Head Office, Stockport**

**Hours:** 37.5 per week

**Accountable to:** Head of Supported Housing and Financial Inclusion

### **Summary of the Job:**

The post holder will be responsible for the management of a caseload of corporate appointeeships. These will be vulnerable adults unable to manage their own finances and whom require support to claim and manage DWP benefit claims. The post holder will ensure that all benefits are maximised and that the client has access to finances for the purpose of daily living costs, bills, activities and any other sundries.

The post holder will have some knowledge and preferably experience of working with the DWP benefits system and will be responsible for providing welfare rights and budgeting advice to all clients and support staff at Creative Support as and when required. This may include the delivery of corporate training to staff and clients or developing help documents and briefings.

The post holder should expect some national travel on occasion, visiting our services and offering advice and support and information to clients, staff within local offices and other relevant parties including (but not limited to) Social Workers and family members.

### **Support of Clients – Corporate Appointeeships**

1. To act as a corporate appointee for a caseload of specified vulnerable clients and to follow the corporate Code of Conduct for Appointees at all times.
2. To ensure that all clients under appointeeship receive their full benefit entitlement and that any relevant changes in circumstances are reported to the appropriate benefit agency promptly to prevent any under / overpayments of benefits.
3. To make sure that as clients migrate to different benefits e.g. PIP, Universal Credit or Pension Credit, that claims are initiated and claimed promptly and correctly and that the client is not affected adversely by any negative decisions made by the DWP.
4. Where any benefit agency makes a decision that appears to be incorrect, an Officer should promptly follow the appropriate appeals process to ensure that we do everything to ensure the clients benefits remain maximised. This may include attending benefit tribunals.
5. To always manage corporate appointeeships in a person centred way, which promotes the independence of the client as far as possible whilst acting in the best interests of the client. This will include visiting clients where appropriate and discussing their finances with them and other relevant parties.
6. To administer and monitor corporate appointee bank accounts, ensuring all financial arrangements are properly documented within agency guidelines. This will also involve liaising with our Relationship team at Barclays bank and using the online banking portal to set up standing orders and print off bank statements.

- 7.** To ensure that all clients under appointeeship have access to money as and when required and that there is a budget in place for each person in order to ensure that there is money available for essential expenditure and that we have identified any disposable income.
- 8.** To administer and monitor the use of the pre-pay card system used at Creative Support for the purpose of clients accessing their weekly finances and pay for sundries as necessary. This includes populating a monthly spreadsheet, checking requisitions and ensuring that the client has enough money on the pre-pay platform to facilitate access to the monies needed.
- 9.** To ensure that all bills are set up by direct debit from the corporate bank account where possible but where paid by other methods to ensure this is done promptly to avoid additional charges or court summons for late payments.
- 10.** To ensure that whenever a significant decision needs to be made in relation to the appointeeship and where the client does not have capacity to make this decision themselves that a best interest meeting will be held (which the post holder may be required to attend) and that the post holder follows the decision resulting from this meeting.
- 11.** To ensure that with regards to large purchases, due consideration has been shown for value for money and taking into consideration the client's personal choices where appropriate.
- 12.** To carry out (where appropriate) initial visits to potential new appointees and assess the need for this arrangement using agency guidelines. To use this visit to obtain all appropriate information including (but not limited to) name, address, national insurance number, landlord and any arrears information.
- 13.** To carry out regular reviews of all appointeeships to make sure that there is still a need for the arrangement or if a relevant change has happened or if alternative arrangements could be put in place to ensure its viability.
- 14.** To ensure that if and when an the appointeeship transfers to another organisation or individual that the new appointee has all the information that they require to take the appointeeship on and that we promptly transfer any savings to that representative and do not withhold the balance unnecessarily.
- 15.** To be open, honest and accountable in all financial transactions and in accordance with corporate policy. This will involve working alongside the internal auditors who will monitor adherence to corporate policy.
- 16.** To ensure that all clients under appointeeship have a Housing Benefit claim (where appropriate / necessary) and that any difficulties with these claims are monitored and resolved swiftly.
- 17.** To ensure that were an appointee is not entitled to Housing Benefit for any reason that a standing order or direct debit is set up with the landlord to ensure payment of rent is prompt and correct and does not cause arrears to accrue. Where arrears have accrued, to ensure that efficient, effective payment arrangements are put in place.
- 18.** To undertake the administration relating to motability cars including payment of initial payments and writing open insurance letters in order that support staff can drive the vehicles.

19. To monitor Care Charge Assessments to ensure that clients are not over / under charged in relation to the cost of their care and support. This should include making sure that all disability related expenditure has been taken into consideration and that any capital held by the client has been accurately declared.
20. Where relevant, to monitor household bank accounts set up for services where we act as corporate appointee for all clients who reside there. This includes making sure all clients are contributing an equal share towards the bills at the property and that bills are paid on time and with regards to utilities, that the bills are based on accurate readings and not estimates.

### Support of Clients – General

21. To provide welfare benefits and budgeting advice to all Creative Support services when needed and regardless of whether the service has any appointees within it.
22. To support staff to maximise our clients income through the delivery of training, attendance at staff Team Meetings and advice to increase their awareness and knowledge of benefits available and to assist with difficult benefit claims and appeals.
23. To work with staff and clients to promote financial inclusion by providing support with avoiding and managing debt, setting up bank accounts etc. and to sign post clients in the direction of specialist advisors where appropriate.
24. To work with other departments to ensure that any clients who upon review may appear to lack capacity or need some support with their finances / benefits are offered relevant, appropriate support including where necessary an appointeeship.
25. To work with and support the Internal Audit Team to make sure any financial irregularities are reported and investigated.
26. To help develop and deliver drop in sessions regionally for staff and clients to attend with welfare rights or financial issues. To help develop and deliver budgeting training to our clients where appropriate.
27. To facilitate the purchase of items via the company client credit card, ensuring all financial procedures have been followed and documented. This includes ensuring that all recharges are paid fully by the client.

### Other

28. To carry out all work in a manner consistent with the aims and ethos of Creative Support.
29. To maintain an honest, open and accountable system of record keeping, including the maintenance of diary notes on the internal Housing Database, saving pertinent emails and scanning important documents.
30. To take part in the Housing and Welfare Right's Team Shift Co-ordinator rota, dealing with enquiries for colleagues when they are not in the office.
31. To ensure the needs of the service are met which may include picking up new cases, swapping cases with a colleague or supporting with difficult cases.

- 32.** To keep the Housing and Welfare Right's Team database up to date with all pertinent information.
- 33.** To accept support, supervision and guidance from senior colleagues and line manager.
- 34.** To notify line manager and Shift Co-ordinator of planned whereabouts when out of the office. This will include logging on and off at the start and end of the day.
- 35.** To ensure that if anything is witnessed that is not felt to be appropriate that these concerns are reported to your line manager or relevant senior manager.
- 36.** To monitor the condition of Creative Support properties whilst out on visits and ensure any concerns re the condition of the property are reported to the Property Services Team at Head Office.
- 37.** To maintain confidentiality at all times, in accordance with the agreed policy.
- 38.** To comply with and to implement Creative Support's Equal Opportunities Policy.
- 39.** To observe any written policies, procedures and guidelines for good practice as agreed by Creative Support.
- 40.** To identify training needs in discussion with line manager and to attend training events and courses as required.
- 41.** Any other duties as required.

**PERSON SPECIFICATION – Financial Inclusion and Welfare Rights Officer**

**Head Office, Stockport**

	<b>QUALITIES REQUIRED</b>	<b>How assessed?</b>	<b>Essential or Desirable?</b>
<b>1.</b>	Experience of general administration and record keeping	Application /Interview	Essential
<b>2.</b>	Experience of working in social housing and supported housing	Application /Interview	Desirable
<b>3.</b>	A working knowledge of welfare rights and the benefits system and experience of giving advice and information	Application /Interview / Test	Desirable
<b>4.</b>	Understanding of data protection & confidentiality issues	Application /Interview	Essential
<b>5.</b>	Familiarity with computerised records and accounts	Application /Interview	Essential
<b>6.</b>	A relevant vocational qualification	Application /Interview	Desirable
<b>7.</b>	Good first degree or equivalent qualification	Application /Interview	Desirable
<b>10.</b>	Good numeracy skills	Test	Essential
<b>11.</b>	Ability to analyse and interpret complex written and numerical information	Application /Interview	Essential
<b>12.</b>	Excellent IT and data management skills, including proficiency in Microsoft Word, Outlook and Excel	Application /Interview / Test	Essential
<b>13.</b>	Excellent time management skills, including the ability to work on a variety of tasks and multiple projects and to prioritise these effectively on own initiative and using self motivation	Application /Interview	Essential
<b>14.</b>	Ability to deal effectively with challenging situations and/or persons diplomatically but assertively	Application /Interview	Essential
<b>15.</b>	Ability to engage effectively, meaningfully and sensitively with service users from a range of client groups	Application /Interview	Essential
<b>16.</b>	Ability to build strong working relationships both internally and externally	Application /Interview	Essential
<b>17.</b>	Excellent customer care skills and the ability to respond to a wide range of enquiries.	Application /Interview	Essential
<b>18.</b>	Willingness to consult colleagues and to work as part of a team	Application /Interview	Essential

<b>19.</b>	Courteous, friendly and professional telephone manner and e-mail style both internally and externally	Application /Interview	Essential
<b>20.</b>	Ability to work out of hours and attend evening/weekend meetings as and when required	Application /Interview	Essential
<b>21.</b>	A commitment to continuous improvement of services, sharing ideas with manager and colleagues	Application /Interview	Essential
<b>22.</b>	Willing to accept constructive feedback and adapt actions/behaviour accordingly	Application /Interview	Essential
<b>23.</b>	A commitment to equal opportunity policies and practices	Application /Interview	Essential
<b>24.</b>	Willing to attend training courses and events	Application /Interview	Essential
<b>25.</b>	Willing to travel nationally based upon the needs of the services	Application /Interview	Essential
<b>26.</b>	Good work ethic, timekeeping, attendance, professionalism and reliability	Application, interview & references	Essential

**TERMS AND CONDITIONS – Financial Inclusion and Welfare Rights Officer**  
**Head Office, Stockport**

<b>Salary:</b>	<b>Up to £27,768 per annum</b>	
	<b>Point 1:</b>	£12.85 per hour / £25,116 per annum
	<b>Point 2:</b>	£13.39 per hour / £26,110 per annum
	<b>Point 3:</b>	£13.84 per hour / £26,988 per annum
	<b>Point 4:</b>	£14.24 per hour / £27,768 per annum
	<b>Please Note:</b> <i>Our pay date is the 15th of each month (or the Friday before if this falls on a Saturday or Sunday). You will be paid in arrears for the previous 4/5 weeks, dependent on your starting date within the month. Starting pay points are allocated upon commencing the role based on criteria inclusive of experience, current specialism, salary and qualifications.</i>	

**Holidays:**

25 days plus 8 statutory days pro rata.

**Hours of Work:**

You will work 37.5 hours per week, Monday to Friday. Hours of work are 9am till 5pm to be worked flexibly dependant upon the requirements of the organisation and the department.

**Bank Holidays:**

An enhancement is paid for working at Christmas and New Year. We do not pay enhancements for working evenings, weekends or any other public holiday.

**Birthday Holiday Bonus:**

You will be permanently entitled to one additional day (pro rata for part time employees) annual leave to be taken two weeks either side of your birth date. If you do not take this additional day within that period you will lose this entitlement for that year. Staff who are on maternity, paternity, adoption and sick leave at the time of their birthday will be entitled to take this additional leave upon their return to work.

**Disclosure Checks:**

All appointments will be subject to DBS enhanced disclosure and ISA checks.

**Probationary Period:**

The first four months will constitute a probationary period. When this is successfully completed, employment will be confirmed.

**Probationary Bonus:**

After the probationary period has been satisfactorily completed your further employment will be confirmed. Upon successful completion of your probationary period you will be entitled to a one off £100 bonus pro rata (subject to tax), providing all induction processes have been completed satisfactorily and upon completion and submission of you end of probationary review paperwork.



### **Sickness Policy:**

Creative Support operates a discretionary company sick pay benefit scheme which is for the purposes of preventing hardship during times of serious illness. The eligibility criteria and conditions for payment of Company Sick Pay (inclusive of SSP) are shown in the Employee Handbook. You may be eligible for Company Sick Pay benefits subject to compliance with these criteria as follows:-

- Creative Support do not pay for the first three days of **any** sickness absence.
- First twelve months service - Not eligible for Company Sick Pay though you may be entitled to SSP.
- Twelve months to twenty four months service - Up to a maximum of four weeks at full pay.
- Twenty four months plus service - Up to a maximum of eight weeks at full pay followed by four weeks at half pay.

### **Pension:**

Creative Support operates an auto-enrolment pension scheme with the People's Pension.

### **Life Assurance:**

Currently set at two times basic annual salary. Staff become members of a non-contributory group life assurance scheme after 6 months of employment. This scheme provides a death in service benefit of two times annual salary. Participation in this scheme is subject to the rules of the scheme as amended from time to time. We reserve the right to discontinue, vary or amend the life assurance scheme at any time on reasonable notice to you.

### **Discretionary Benefits:**

Creative Support offers discretionary benefits in addition to statutory benefits. These include:

- Paid paternity leave
- Enhanced maternity leave
- Compassionate leave
- Carer's leave up to 5 days per annum#

### **Employee Assistance Service:**

This is currently administered by Health Assured. This is a completely free service, offering valuable advice on benefits, financial matters, consumer advice, health and legal issues. There is also a free counselling service which is accessible 24 hours a day, 7 days a week. Anything discussed with Health Assured is completely confidential and will not be shared with Creative Support.

### **Hospital Saturday Fund:**

An easy and affordable way to help you spread the cost of healthcare such as dental, optical & physiotherapy.

### **Annual Rail Ticket:**

Discounted annual rail season ticket plans available to employees through Northern Rail.

### **Payroll Giving:**

Administered by Charities Trust: A tax efficient way of donating from your pay on a regular basis to any registered charities.

**WeCare Awards:**

Recognising dedicated staff across the organisation with standard, silver and gold awards given out every 2 months.

**Your Rewards:**

Employee benefits and discount vouchers available through the Your Rewards website.

Long service: Awarded in the December following your 10, 15, 20 and 25 year anniversary of your continuous service date with the organisation.

**Retirement Awards:**

£100 bonus should you choose to retire whilst employed by Creative Support. Eligible for all permanent contracted employees with at least two years continuous service.

**Refer a Friend Scheme:**

Staff who successfully refer a friend to Creative Support's employment can claim £100 worth of vouchers when their friend starts and another set of £100 worth of vouchers when their friend passes the End of Probationary Review after four months of employment.

**Welcome Back Grant:**

£200 worth of vouchers for employees who return to the organisation who have at least six months between resigning from their original post and taking up their new role.

**Uniform:**

If applicable for your service you will be provided with a uniform. The amount of uniforms that are provided will be dependent on your hours worked.

**Company mobile phone and laptop:**

If applicable to your job role the provision of a mobile smart phone, laptop and a 3G/4G dongle may be provided. Please note the employee will be liable for any damage or theft of these devices.

**Travel Expenses:**

These will be paid in accordance with the organisation Travel Expenses policy, please contact the HR Department for a copy of this.

**Lease Cars/Car Allowance:**

A mileage allowance is payable for the use of employee's car on organisation business. The organisation will reimburse your costs incurred on organisation business on a monthly business upon receipt of authorised claim forms. If you use a car on organisation business you will be required to have business use insurance. An employee's certificate of insurance must be made available for inspection on commencing employment.

**Networks:**

The EDI Network and the LGBTQ+ Network are available to all our employees. The EDI Network advocates for our staff of colour whilst providing support and resources for employees who may face challenges related to diversity and inclusion. The LGBTQ+ Network promotes visibility and representation of LGBTQ+ individuals within the company.