

Job Profile

Core job information			
Job Title	Financial Inclusion Assistant		
Working hours per	25	Appointment	As soon as possible
Reports to (job title)	Senior Officer/Manager	Current location	16 Commercial Street, Sheffield or Eastwood Lane, Rotherham (to be confirmed)

Job purpose *(Why does the job exist? What is it there to achieve or deliver?)*

To provide information and access to the full range of Credit Union services, to the highest standard of customer service including savings, loans and budget accounts, with particular emphasis on access to starter accounts for those who cannot access bank accounts, and other means to reduce financial exclusion.

Knowledge, Skills & Experience *(work experience, qualifications, specialist training, key skills, disposition)*

	Requirements	Essential/Desirable
Qualifications	GCSE grade A-C in English and Mathematics or equivalent	Essential
	Further qualifications in IT, Customer Service and Mathematics or equivalent	Desirable
Experience	Customer Services or Customer Support Experience	Essential
	Experience of processing data and financial transactions	Desirable
Knowledge, skills & abilities	Knowledge of how to operate spreadsheets, emails and word processing software	Essential
	Knowledge of Credit Unions and how they operate	Desirable
Attitude & disposition	Positive, enthusiastic and solution-focused	Essential
	Non-judgmental, supportive and empathetic	Essential
	Committed to clear communication and consistency	Essential
Other circumstances	Willing and able to cover for other roles	Essential
	Able to work in Rotherham or Sheffield centres, between approximately 8:30 and 16:30 on Tuesday, Wednesday and Friday, plus half-day Monday)	Essential

Accountable Areas (Reviewable in Appraisal Meetings)

- Signing up members to starter credit union accounts and assisting them to become more financially included via various tools.

Main Duties and Responsibilities of the Role (may involve some or all of the responsibilities listed below, dependent on specific role)

- Responsible for administering and monitoring member accounts, and assisting with improving financial inclusion through provision of appropriate services and making suitable referrals;
- Responsible for delivering customer service to a high standard, with focus on meeting the needs of the customer within the parameters of what can reasonably be delivered;
- Responsible for clear and accurate communication, and accurate handling of transactions;
- Responsible for paying due care and attention to the safety of the staff team, customers and building, using appropriate resources and procedures to support this;
- Responsible for referring customer complaints and customer charter breach concerns to a Senior Officer to be logged and progressed;
- Responsible for following protocols and policy guidelines in all areas;
- Responsible for accurate entry of data in the customer data base;
- Responsible for contributing to the cleanliness and tidiness of desk and shared areas;
- Responsible for processing payments at front desk and/or electronically if required, with due attention to accuracy and the safety of cash and cheques issued & received;
- Responsible for enrolling new members, providing membership information, paying due care and attention to anti-money laundering requirements to minimise fraud and financial crime;
- Responsible for administering and monitoring accounts, and assisting with improving financial inclusion through provision of appropriate services and making suitable referrals;
- Responsible for delivering appointments for loans of all types and all account administration;
- Responsible for responding to email and web requests, including enrolling new members, processing web withdrawals and answering queries;
- Responsible for handling telephone enquiries and dealing with answer phone messages, responding to all enquirers;
- Responsible for recording clear and accurate telegram and diary messages to enable member accounts to be handled accurately, efficiently and consistently;
- Responsible for communicating with members via email, telephone, face to face and by written letters, the latter approved by a Senior Officer or Manager when not a standard letter;
- Responsible for using professional and non-judgemental language and practices;

Working Environment *(knowledge of special working practices, breadth of management skill required, customer impact, responsibility, efficiency)*

This role will include working both on the customer facing level and on the back office level, and will include direct communication with customers and partners, by email, telephone and face to face. It will require learning about all Credit Union services, and the willingness to keep up to date with new and

updated information. It will require team working, clear communication and taking part in appraisals, raising training and developmental needs as appropriate.

Freedom to Act & Decision Making *(depth of control, supervision received, use of judgement & initiative, analytical ability)*

The role will require day to day decision making within policy guidelines, with appropriate referral to senior officer and area experts. Solving problems within area of responsibility and use of initiative and judgement are expected, and contribution to development and improvements is encouraged. Out of policy decisions are expected to be referred to a senior officer/manager.

Communication & Networking *(liaison with others, type and level of communications)*

Liaison with staff team, senior officers, management, external partners, customers/members and Board members is expected. Where communication is vitally important, verbal communication should be backed up in writing, via email or letter. Networking to help to improve a service, resolve issues and explore new areas of working is encouraged.

Finance/Resource Management *(budgeting, forecasting)*

It is expected that care be taken to ensure the resources are used appropriately and waste is minimised.

People Management *(supervisory responsibility, human relations skills)*

It is expected that the role involves complying with reasonable requests of senior officers, managers and Board members, as well as working co-operatively with colleagues.

This job description sets out the duties of the post at the time it was drawn up. Such duties may vary from time to time without changing the general character of the duties or level of responsibility entailed. Such variations are a common occurrence and cannot of themselves justify a reconsideration of the grading of the post.