Building homes, independence and aspirations

Job Profile

Job Title	Financial Inclusion Partner		
Job Reference No.	HOMEJD221	Date of issue:	September 2026

The job in a **nutshell…**

You help customers become more financially independent by understanding their options, accessing the support they are entitled to and empowering them to manage their money with confidence. Through specialist advice and practical support, you help maximise income, sustain tenancies and connect people with affordable financial products and services.

Working with housing colleagues and external organisations, the role connects customers with welfare benefits, grants, affordable services and trusted local support.

What **success** will look like**…**

Customers receive accurate welfare benefits advice that reflects their circumstances and helps them access the support they are entitled to. Complex information is explained clearly, giving customers confidence to make informed decisions and helping colleagues access specialist guidance when financial issues affect a tenancy.

Customers facing financial difficulties receive timely, practical support that helps maximise income and reduce financial pressures. Potential issues are identified early, helping customers maintain their tenancy and build greater stability while remaining in control of decisions about their finances.

Discretionary Housing Payment applications are completed accurately and progress smoothly through strong relationships with local authorities. Customers understand what evidence is needed and receive the support required to give eligible applications the best chance of a positive outcome.

Customers access grants, bursaries and other sources of financial support that may otherwise have been missed. Applications are well-evidenced and submitted successfully, helping people overcome immediate financial challenges and improve their longer-term financial wellbeing.

Strong partnerships with local authorities, charities and community organisations provide customers with access to the right support at the right time. Customers benefit from coordinated services that complement Home Group's offer and help them sustain positive outcomes.

Customers can confidently use digital tools and services to manage their finances, access information and find support. Digital solutions promote independence while ensuring customers continue to receive personalised support when additional help is needed.

Complex financial and tenancy issues are resolved through effective advocacy and partnership working. Customers' interests are represented fairly, barriers are removed where possible and colleagues have access to clear, reliable advice that supports decision-making.

Financial inclusion support remains accessible, consistent and responsive to customer needs. Colleagues understand the support available, customers know where to turn for help and the service contributes to tenancy sustainment, financial wellbeing and positive customer outcomes.

You'll already have these **brilliant** skills, qualifications and knowledge**...**

Transferable Skills.	Technical qualifications, experience and knowledge.
We have a win-win mentality • Strive to find a solution everyone is happy with • Take ownership of join issues and see them through to resolution • Be positive and solutions-focused • Listen to what others need and consider this when deciding what to do	**Wefare benefits knowledge** • Strong knowledge of welfare benefits, welfare rights and relevant reforms • Knowledge of Department for Work and Pensions and local authority processes • Ability to give accurate advice based on individual customer circumstances • Experience supporting people to claim the income they are entitled to
We have an eye for detail • Pays attention to the details • Applying legislation, working within policies and procedures • Using and recording information accurately and timely	**Financial casework** • Experience providing advice, support and advocacy about financial difficulties • Ability to explain complex financial information in clear, accessible language • Experience helping people build confidence and greater financial independence • Ability to negotiate practical solutions to complex customer problems

We get where our customers are in their lives	Partnerships and funding
• Advocate for our customers regardless of who they are and amplify their voices • Listening to customers to understand their needs • Recognise each customer is different and adopt a flexible, personal approach	• Knowledge of organisations providing grants, advice and practical support • Experience developing productive relationships with internal and external partners • Ability to identify and apply for suitable grants and bursaries • Experience working with local authorities and community organisations

We'd also love you to have, or be **brilliant** at… (but don't worry if not)

Knowledge of social housing and the factors affecting tenancy sustainment

Understanding of arrears management and related legal processes

Experience using digital financial inclusion tools and self-service resources

Knowledge of local community services and referral routes

A full driving licence and access to a vehicle for work

We're all **accountable** for…

Health and Safety of our ourselves and others; put simply this includes taking the time to complete all learning, understanding your role-specific responsibilities, working with reasonable care and taking steps to address and report problems related to Health and Safety.

Taking a proactive approach to your learning and development to be the best you can be. This includes understanding and keeping up to date with all our relevant policies and processes as well as taking advantage of all the learning opportunities and resources available to you … they're there for a reason but don't worry, we'll help keep you informed along the way.

Promoting equality, diversity and inclusion as a top priority at Home Group; leading by example in your actions and demonstrating our Brilliant People behaviours.

Keeping things compliant! You'll have role-specific and organisational goals but it's important you take these seriously and keep people and information secure and safe within the scope of doing your bit here at Home Group.

Comfortable operating in a modern digital workplace, including using digital tools to work collaboratively and productively.

Other **important** stuff…

Budget Holder	No	Budget value up to £	Enter value
Manages People	No	# of direct reports circa	Enter value

Travel	Frequent	Driving Essential	Yes
DBS	Enhanced with barring		

