Financial inclusion Manager

June 2026

Job description and person specification

Job description – Financial Inclusion Manager

Reporting to the Regional Director (Central), hybrid working with regular office attendance both in your main base at Old Park but also across the HPG area of operation.

Responsible for two EMA Managers, Debt and Energy Manager and teams

Summary of role:

As part of the Group's wider leadership team, the Financial Inclusion Manager plays an integral role in achieving positive financial outcomes for our customer base through advice, projects and interventions. This enables the operational delivery of the following organisational priorities:

- Delivering more for our customers
- Having the capacity to build more homes
- Being a great place to work for our colleagues
- Being a financially resilient business
- Being a key influencer in the region

The role has leadership responsibility for role modelling and embedding our valued behaviours, and supporting the wider business to develop a positive, inclusive and engaging culture:

- Own it – Make it happen
- Improve it – Move things forward
- Live it – Show understanding and compassion

Key requirements include;

Leadership & Organisation-wide impact

- Working with colleagues across the wider Regional teams to execute and implement the organisation's strategies
- Supporting the leadership team to overcome barriers to high performance and delivery of positive outcomes by providing an internal service which meets their needs
- To provide insight and challenge which will inform operational plans and delivery
- To advise and make recommendations for positive change across the organisation so that merger benefits and integration principles are achieved
- To contribute to governance policies, systems and practices

Specifically for the Financial Inclusion Manager

The services that fall within the portfolio include:

- Financial Inclusion – Defining and leading our approach to Welfare benefits, Budgeting skills and Financial resilience.
- Debt and cost of living changes – leading our approach to Debt Management and our response to cost of living challenges.
- Leading our approach to managing customer financial crisis.
- Employment and Digital skills – through the hubs and other activities, leadership of our approach to empowering customers into employment and the key partnerships involved with this.

- Communication – to ensure that our communications around the key themes are proactive and impactful to our customer base.

Key areas of responsibility: Financial inclusion

- Leadership of our approach to financial inclusion and resilience, providing services that;
    - Proactively assist our customer base respond to financial challenge
    - maximise customer income and promote opportunity to personally develop
    - Support a sustainable management of debt and cost of living spikes
    - Work internally and externally with asset colleagues to assist in identifying key projects aimed at improving the energy efficiency of our homes and to assist in limiting cases and impacts of damp and mould.
    - Sustain tenancies, preventing homelessness.
- Working with Directors, fellow Managers and the relevant teams to define the HPG Financial inclusion Strategy.
- Production and delivery of flexible and dynamic action plans that reflect our strategic approach but also flex with changes in the wider economic climate.
- Regular measurement, benchmarking and review of the service to ensure it represents value for money and continues to meet customer need.
- Setting the culture for the wider team and creating regular cultural health checks to gauge progress.
- Establishing HPG as a partner of choice in this service area across our geography. In doing so encourage collaborative working and our ability to access other funds and services that benefit our customer base.
- Establish monitoring and evaluation systems to assess the impact and outcomes of financial inclusion initiatives.
- Ensure services provided through the teams are aligned to our wider strategic approach and contribute to organisational pillars.
- Embed a person-centred risk assessment approach to services to prioritise resource to those at greatest risk of getting into debt or tenancy failure.
- Understand potential tensions between different teams and create a balance between supporting the customer and appreciating business needs.
- Ensure that the software we use to manage cases is robust and allows easy reporting on key areas of performance

Partnership working

- Form, maintain and enhance working relationships with key partner organisations such as;
    - Local Authorities
    - CAB
    - Credit Union, banks and other financial institutions
    - DWP
    - FCA
- Lead, support and assist in campaigns to increase financial inclusion. Where possible ensure that communication is proactive and ahead of pressure points, rather than reactive.
- Assist all teams across the business to engage their customers in financial inclusion events.
- Promote debt related services to customer base and work in conjunction with others to control the impact of energy and other commodity price changes.
- Assess our services against the Consumer Duty Principles annually and feedback to customers and committees.

- Investigate grant or other funding opportunities to deliver against our strategy.

Customer and employee involvement and communication

- Ensure that financial services are accessible for our customers including wider opportunities for access via Internet / website development.
- To develop innovative ways to ‘brand’ financial inclusion services and communicate with customers regarding financial inclusion matters, liaising with the Communication & Marketing team.
- Regularly engage customers in reviewing financial inclusion projects and policies, encouraging co-design of future activity.
- Embed the importance of engaging and listening to customers and communities through the wider team.
- Promote and publicise HPG’s approach to financial inclusion to customers and employees in a variety of formats.
- Communicate progress of projects in an appropriate form and frequency to a range of employees, the Board and externally.
- Deliver and commission appropriate training for residents and employees.

General Management Responsibilities

- Lead and manage resources in a flexible and effective manner to support the core aims of our business and our Regional teams.
- Be responsible for the management of financial resources within this service area.
- To make agreements and financial decisions with partners for service delivery on behalf of HPG.

Additional responsibilities:

- Regular attendance at SPaCE (or equivalent committee)
- Close working across directorates where themes overlap
- Compliments the wider team dynamics and Regional working.

- **Health and Safety**
    - Maintain a safe working environment for yourself and others, supporting a positive safety culture.
    - Be conversant with the Group’s Health & Safety Policy (Statement of Intent and sections 5.6 & 5.7 “Health & Safety Responsibilities”).
    - Ensure all Health & Safety policies and procedures are fully implemented and adhered to

- **Data Protection**
    - Follow and ensure the team follow Data Protection principles in all work activities.
    - Attend any GDPR-specific training required for the role.

Additional responsibilities:
Participate in the Group’s emergency on-call rota as required, responding to service or premises-related incidents, recognising that arrangements may vary across legacy organisations and may change to meet future business needs.

Person Specification

What do I need to be successful as the Financial Inclusion Manager;

- Role model the Group's valued behaviours; Own it, Improve it and Live it, ensuring valued behaviours are embedded in your team through effective support, recognition and performance management.
- A team working ethos with exceptional people management and team leadership skills which motivate and inspire.
- Ability to champion collaboration, break down silos and encourage a one team mentality.
- Able to communicate, support and implement the organisation's strategic priorities, culture and purpose.
- Strong experience of measuring and monitoring effective service delivery and addressing performance concerns or issues.
- Experience of contributing to organisation-wide strategic planning and horizon scanning.
- The ability to devise or contribute to change initiatives which encourage new ways of working in times of transition. Be consistently positive about new ideas and learning.
- Strong stakeholder management
- A strong commitment to Equality, Diversity and Inclusion and embedding this through the service
- The ability and experience to contribute to any governance or regulatory issues which the organisation may encounter in this service area
- Ability to work at pace.
- Experience of developing strategic plans to address workforce challenges and drive positive outcomes
- Skilled at negotiating and influencing, with ability to apply different techniques to varying situations.
- Able to communicate complex information in a concise and accessible way to a variety of audiences.
- Knowledgeable and up to date regarding technology and digital aspects of portfolio.

Additional specialist skills

- Professional Qualification: Ideally qualified to a minimum of 'Generalist Advisor' level or equivalent, and preferably hold a Certificate in Money Advice Practice (CertMAP) from the Institute of Money Advisers (IMA). NEA / City & Guilds Level 3. (Essential)
- Professional Qualification: CIH level 4 (Desirable)
- Educated to A-level or equivalent standard with demonstrable developed communication and numeracy skills (Essential)
- Knowledge of Employment related initiatives and opportunities (Desirable)
- Understanding of and commitment to the Safeguarding of vulnerable customers (Essential).
- Understanding of public sector funding models where applicable to this service area (Desirable)
- Ability to interpret and use data for decision-making (Essential)
- Knowledge of energy and other commodity markets (Essential)
- Demonstrable partnership outcomes (Essential)