

F2F Caseworker Job Description/Specification

Job title: Pension Wise Guidance Specialist (Caseworker)

Reports to: Service Supervisor

Salary: up to £25,000 p.a. Pro rata for part time hours

Staff responsibilities: none

Overall purpose of the role:

To deliver a specialist quality service to customers eligible for the pensions guidance service who have complex pension scenarios by supplying accurate, personalised, relevant information and guidance on their pensions options and choices.

The following are the main duties of the role:

1. Provide face to face pension and retirement information and guidance to members of the public as per the standards set by the FCA.
2. To help consumers to understand the full implications of their pension choices using appropriate skills, including numerical.
3. To raise consumer awareness of pension scams and fraudulent activity, to encourage consumers to report any issues to the relevant authorities and to report potential scams and fraudulent activity through appropriate internal channels.
4. Respond proactively to consumer demand, working to agreed service delivery standards.
5. Provide timely and accurate follow up information that adds value to the consumer and is clear and easy to understand.
6. Contribute towards shared best practice within the individual bureau and across the local Citizens Advice (LCA) network.
7. Ensure that all work conforms to the guidance guarantee quality standards.
8. Ensure that all required management information is both captured and reported on a timely basis.
9. In addition, you may be required to carry out ad hoc projects to improve the service we provide, attend meetings or workshops and support promotional activity for the service, within the scope of the role.

Person Specification:

Essential

1. Numerical skills to understand financial matters, statistics and check calculation so that the individual is empowered to take personal action.
2. Good foundation knowledge of pensions law and practice.

3. Knowledge of a broad range of pension arrangements, both occupational and personal.
4. An understanding and appreciation of wider retirement issues.
5. Proven ability in financial capability or consumer advice generally, and an understanding of the issues consumers face in trying to manage their money.
6. Strong questioning skills and the ability to get to understand key client issues whilst maintaining structure and control during the course of a client interview.
7. Ability to translate complex ideas and topics into clear, concise and engaging content that the general public are able to understand.
8. Ability to identify connecting advice issues and assess an individual's ability to take action.
9. Strong influencing and communication skills. The ability to build a rapport, communicate confidently, effectively and persuasively, using oral and written techniques (including in Welsh and English where applicable).
10. Proven ability to work on own initiative – to monitor and maintain own standards and meet qualitative and quantitative targets for service delivery using proven organisational and time management skills.
11. Proven organisational and time management skills.
12. Flexibility and willingness to work as part of a team.
13. Understanding of and commitment to the aims and principles of the LCA service.
14. Understanding of, and commitment to, equality and the positive value of diversity.
15. A commitment to undertake relevant assessment, necessary for continuing professional and technical development relevant for the role.
16. Knowledge of the practical implications of working within a bilingual environment

Desirable

1. APMI or CII qualifications or equivalent in related areas would be of benefit.
2. Willingness to travel, possibly involving overnight stays, and working outside of core hours including evening and weekend working.