

# Candidate Information



**Benefit Advisor**

Part-time & Permanent

Closing Date: 8am on Tuesday 7<sup>th</sup> January 2025

# Pack Overview

Thank you for your interest in our vacancy for a Benefit Advisor. We're so pleased that you're considering working for Age UK South Gloucestershire.

In this Candidate Information Pack, you'll find the following information:

- About us, our history and our links with Age UK
- The benefits of working at Age UK South Gloucestershire
- Job Description and Person Specification
- How to apply

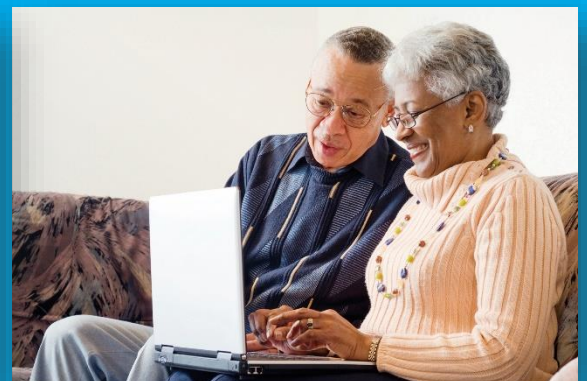
If you have any questions about any aspect of the organisation or the role, please don't hesitate to get in touch.

## About Age UK South Gloucestershire

Age UK South Gloucestershire is a charity, governed by an elected board of trustees and is part of the Age UK network. We've been working in the local community to help older people for 25 years. The charity makes a positive contribution to the lives of hundreds of older people in South Gloucestershire every week. Based from our main office in Thornbury High Street, Age UK South Gloucestershire actively designs services that meet the wants and needs of local older people and their families by:

- tackling loneliness and isolation
- promoting health, wellbeing and independence
- supporting families and carers
- helping people access services and financial benefit entitlements
- enabling people to get the most out of life

We respond to more than 5,000 enquiries per year with our range of services, which include Activity Day Centres, Befriending, Digital Inclusion, Improving Homes and Wellbeing, Information & Advice provision, specialist Benefits Advice, Reconnect, Walking Groups and Volunteering opportunities.



# Our history

**1997** Age Concern South Gloucestershire was formed.

**2005** Age Concern South Gloucestershire changes its legal structure to become a charitable company.

**2009** Age Concern and Help the Aged merge to form the national charity, Age UK. Then in...

**2010** ...we become an Age UK Brand Partner and trade as 'Age UK South Gloucestershire'.

**2022** Age UK South Gloucestershire is celebrating our 25th Birthday.

## Our Partnership with Age UK

Age UK South Gloucestershire is an independent local charity, but we share a brand with Age UK. This trusted and well-known brand helps to open doors for us locally. Of course, we always have to deliver, but it helps to have the strength of the Age UK brand behind us.

Nationally, there are around 130 regional Age UKs, each with a defined geographical area and separate charity number.

We align ourselves with the work Age UK does nationally by supporting their campaigns, sharing reports and news stories, and using their research to underpin grant and tender applications.

Age UK also provides our local MPs with information about older people that can help drive forward local policies and influence at a national level.

Being an Age UK Brand Partner brings certain responsibilities – namely to deliver services to agreed quality standards and to subscribe to shared values of being:

- Caring
- Effective
- Enabling
- Influencing
- Innovative
- Inclusive

We are aligned with Age UK but we are still a local and independent charity. The services we deliver, the money we raise, the people we support are all in South Gloucestershire. Our Trustees are responsible for strategy, policies and legal compliance.

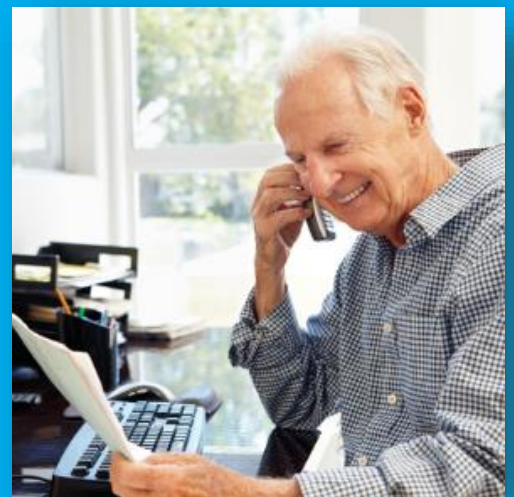


## Working for Us

Age UK South Gloucestershire employs a team of over 25 paid staff, and over 160 wonderful volunteers support its work. The organisation's culture is one that puts people first, and the charity enjoys high staff morale. Age UK South Gloucestershire has an active board of trustees who, as well as providing good governance, work closely with the management team on matters of strategy and direction.

What we offer our staff:

- A Living Wage for employees across the organisation.
- A commitment to a work life balance, with flexible & hybrid working in many roles.
- A healthcare cash back plan allows employees to claim money back towards a variety of health, dental and optical treatments.
- An employee wellbeing scheme, providing free, confidential support, counselling, CBT, financial and legal information or support from a nurse or GP, 24 hours a day, 365 days a year.
- Generous life assurance up to 3 times your annual salary.
- Great discounts and rewards (perfect for pay day!).
- Discount on gym membership.
- A cycle to work scheme.
- A great working atmosphere.
- 25 days holiday per year, rising to 28 days after 3 years' service, plus bank holidays.
- Regular learning and development opportunities with funding contributions toward career developing qualifications.
- Pension scheme enrolment.
- A convenient location for access to local parking.



# Vacancy Details

## Benefits Advisor

Actual Salary £14,977.70 (£24,962.83 FTE)

22.5 hours

(Permanent)

We are looking to appoint an enthusiastic, positive and flexible Benefits Advisor to work across South Gloucestershire.

You will be required to work as part of the Information and Advice Team to provide specialist advice and support to maximise the income, resolve benefit queries and complete benefit forms for clients across the county of South Gloucestershire. The successful post holder will work with members of the public and/or their family members in their homes, so a valid UK driving licence and use of a vehicle is essential for the post.

It is essential that you have excellent verbal and written communication skills, along with a high level of organisation, and a passion for working positively with older people. If you are committed to improving the lives of older people, we would like to hear from you.

Age UK South Gloucestershire is committed to equalities, diversity and inclusion, and encourages applications from all sectors of the community.

If this role sounds perfect for you, download an application pack from our website. <https://www.ageuk.org.uk/southgloucestershire/get-involved/work-for-us/>.

Please return completed application forms to [hr@ageuksouthglos.org.uk](mailto:hr@ageuksouthglos.org.uk).



**Closing date:**

8am, Tuesday 7<sup>th</sup> January 2025

**Interviews:**

Within two weeks of the closing date



## Job Description

<b>Job Title</b>	<b>Benefits advisor</b>
<b>Salary</b>	Actual Salary £14,977.70 (£24,962.83 FTE)
<b>Hours of work</b>	22.5 hours per week.
<b>Working pattern</b>	Flexible
<b>Place of work</b>	67 High Street, Thornbury, BS35 2AW.
<b>Annual leave</b>	25 days annual leave (increasing to 28 after 3 years' service), plus public holidays pro-rata.
<b>Status</b>	Permanent
<b>Other</b>	Willingness to drive – hold a valid UK driving licence

### **Job Purpose**

- To work as part of the Information and Advice (I&A) team, to provide specialist advice and support to maximise the income and resolve benefits queries. Complete Benefit Forms for clients across the county.
- The focus of the post will be on undertaking welfare benefit entitlement checks and supporting completion of the relevant claim forms.
- To Provide generalist advice regarding social care, housing options, and local services, and to deliver a holistic, comprehensive service that responds to the client's full range of needs.
- The post holder will also be required to provide support to volunteers who will support various functions of the role in delivering the required service to meet contractual targets.

**Responsible to**

Information & Advice Manager

**Contacts**

The post holder will work with members of the public and /or their family members, in their homes. With key staff, including the Information and Advice team as well as the wider staff team. In addition to volunteers, South Gloucestershire Advice Consortium member agencies, other voluntary organisations & community groups and Age UK National.

**Key Responsibilities**

The post holder is expected to demonstrate an acceptable level of competence in their role for each of the key duties and responsibilities listed below. Competence means demonstrating the required skills, abilities, attitude and behaviours in your work role.

**Communication and customer service**

1. Undertake welfare benefits entitlement checks and provide specialist support and advice to assist with claiming entitlements and resolving queries via telephone, home visit, office appointments and outreach arrangements as appropriate
2. Provide support to I&A volunteers in client interactions as well as staff from other departments to ensure quality assured advice provision across the charity
3. Provide generalist advice on social care, housing options and local services to clients in the spirit of offering a holistic support service
4. Provide basic energy-efficiency related information and advice where applicable to help maximise income and reduce energy costs
5. Have a good understanding of the boundaries of the advice service and make onward referrals or signpost elsewhere where appropriate
6. Work closely with partners to foster and effectively maintain positive working relationships

**Planning & Organisation**

1. Ensure all contractual deadlines and targets are adhered to as a key priority
2. Effectively manage your own diary and workload including client-facing appointments, team meetings, and other administrative tasks
3. Ensure that your own case load is progressed in a timely manner
4. Be pro-active within the role and provide cover for team members in their absence where appropriate and reasonable.

### **Recording & Monitoring**

1. Prepare and complete all monitoring returns and reports required, this will include providing data and other information relating to the delivery of the service
2. Ensure that all outcomes and codes are entered onto Charity Log in a timely way, including following up on estimated gains to record actual outcomes
3. Be responsible for own administration, working in close cooperation with administration staff and volunteers

### **Charity Focus and Team work**

1. Assist in attending events and other outreach activities to promote the I&A service
2. Engage in informal catch-ups and team meetings to maintain continuous flow of information and peer support throughout the team
3. Work flexibly with team members

### **General Responsibilities**

- Ensure that all administration protocols and procedures are efficiently undertaken.
- Attend supervision sessions & other meetings as required by the CEO.
- Maintain a commitment to professional development through a combination of both formal and informal methods, including attendance at mandatory training and meetings as directed.
- Uphold the highest standards of personal conduct in all matters relating to the role, working within all policies and procedures of AUKSG.

### **Other Duties**

This job description is intended as a guide to the general duties required of the post. The post holder may be required to undertake training and perform duties other than those given in the job description. The duties and responsibilities attached to posts may vary from time to time. Such variations are a common occurrence and would not justify the re-evaluation of a post. Where a permanent and substantial change in the duties and responsibilities occurs, then the post would be eligible for re-evaluation.



### **Disclosure and Barring Service (DBS)**

This post is subject to a satisfactory enhanced Disclosure and Barring Service check, which will disclose all cautions, reprimands and warnings as well as convictions. In addition to completing this application form, you are required to provide us with details of all spent and unspent convictions. Please send this information to us under separate, confidential cover to the Chief Executive Officer. Remember to include your name, address and the position for which you are applying. We guarantee that the information you provide will be used fairly and will only be seen by those who need to see it as part of the recruitment process.

A criminal record will not necessarily bar you from the advertised position. This will depend on the nature of the position and the circumstances and background of your offences. However, failure to reveal this information could lead to the withdrawal of an offer of employment or disciplinary action.

### **Equal Opportunities**

All employees have a responsibility to understand and abide by the obligations laid down in the organisation's equal opportunities policies.

### **Health and Safety**

All employees have responsibility for their own health and safety and for that of others who may be affected by their acts or omissions. Staff members are required to adhere to all health and safety regulations, guidance and procedures at all times.

### **Confidentiality**

All employees are expected to respect confidentiality in relation to Age UK South Gloucestershire business, client and service user data.

## Essential Criteria

- Ability to diagnose a problem without bias or prejudice.
- Ability and commitment to increasing knowledge and skills relevant to the provision of support to older people.
- Excellent administrative and personal organisational skills.
- Excellent interpersonal communication skills and a range of written communication skills for a variety of audiences and purposes.
- A confident and articulate telephone manner.
- Good presentation skills.
- A good level of IT skills, including using Microsoft Office packages such as Word, Excel, PowerPoint and Outlook.
- Ability to establish and maintain effective working relationships with a wide range of people and other agencies.
- The ability to organise and prioritise a challenging workload effectively.
- Ability to use initiative and work independently, but also to work cooperatively as part of a team when necessary.
- An understanding of the issues faced by older people and a commitment to the aims and objectives of AUKSG.
- Commitment to promoting and supporting equal opportunities & diversity.
- Commitment to data protection and confidentiality.
- Willingness and ability to travel as required (The nature of this post will require regular travel throughout South Gloucestershire and occasionally further afield; therefore, access to and the use of a reliable car is highly beneficial)

## Desirable Criteria

- Experience of working in an advice-giving capacity in either a paid or a voluntary capacity.
- Knowledge and understanding of current welfare benefits and pensions relevant to older people.
- Knowledge and understanding of working age benefits.
- Experience of providing advice in other areas of social welfare law.
- Knowledge and understanding of community care and housing.
- Experience and ability to assist clients with the explanation and completion of complex application forms.
- Experience of working with older people.
- Knowledge of more advanced legal information and experience in completing forms, such as Powers of Attorney.
- Sound geographical knowledge of South Gloucestershire.

# How to Apply

If you are interested in becoming our new Benefits Advisor please download an application form from our website:

[www.ageuksouthglos.org.uk](http://www.ageuksouthglos.org.uk)

Completed application forms should be submitted via email or post  
FAO Tracy Marshall, Office Supervisor:

hr@ageuksouthglos.org.uk

or

Age UK South Gloucestershire,  
67 High Street, Thornbury, Bristol, BS35 2AW

Please ensure you have also completed the Equality and Diversity Monitoring section of the application form. The information on the form will be treated as confidential, and used for reporting purposes only. The form will be kept separate and will not form part of the application process.

## Closing date:

8am, Tuesday 7<sup>th</sup> January 2025

## Interviews:

Within two weeks of the closing date

For general information on Age UK South Gloucestershire or if you have specific questions about the role, please contact (details above) and she will be happy to arrange for an informal discussion with the appropriate member of staff.



**Age UK Charity  
Quality Standard**

