

JOB DESCRIPTION AND PERSON SPECIFICATION

Job title:	Planning for your Future Adviser
Contract Type:	Fixed Term until 31 st March 2026
Reporting to:	Information and Advice Manager
Working hours:	Full time; 35 hours Monday to Friday
Salary:	£21,000 to £23,000 DOE
Work base:	Flexible Working – Home Working, The Clockhouse, Milford and outreach events within Surrey

Brief Overview of the Role

To work in partnership with Surrey County Council on a campaign aimed at residents who arrange and pay for their own care, to help them understand and navigate the social care system, encourage them to plan for later life and make good decisions about care and support understanding the range of care options available.

Your role will be to work directly with the Planning for your Future Adviser, providing administrative support, event planning and acting as a key point of contact for clients, their families and partner organisations.

Main Duties

- To support the project to help residents with a wide range of enquiries and signpost them to information and advice about planning for later life including welfare benefits and income maximisation, power of attorney, asset management and care options.
- To manage the project administration, ensuring high attention to detail and obtaining consent from clients.
- Procure information resources to distribute at events, on website, via phone enquiries, at groups and via home visits.
- Record and maintain data that supports the project, including the evaluation of events and contact with clients, which leads to the delivery of project objectives and measuring its overall success (Key Performance Indicators)
- Undertake training with the County Council on social care eligibility, information resources and appropriate signposting.
- Work closely with the partner organisations to incorporate their role into the events.
- To work in accordance with all Age UK Surrey/departmental policies and procedures ensuring service quality standards are met.
- To be responsible for the timely and accurate recording of all client and project related data onto Salesforce and relevant databases.
- To provide regular reporting when required by various stakeholders.

Presenting

- To work in collaboration in the planning and delivery of events in each borough and district area across Surrey.
- To signpost clients through a range of channels, including public events, emails and telephone calls.
- To participate in the public presentation of information to groups across Surrey.
- Help adapt and learn from each event for maximum impact and experience for attendees.

Safeguarding

Safeguarding is everyone's responsibility, and all staff are required to act in a way that safeguards the health and wellbeing of vulnerable adults. Familiarisation with, and adherence to, the appropriate organisational Safeguarding Policy and associated guidance is an essential requirement of all staff, as is participation in mandatory training.

Person Specification: Planning for your Future Adviser

Skills and abilities:

- Able to work autonomously
- High attention to detail
- Excellent communication and inter-personal skills.
- Highly organised and self-motivated
- Proficient in MS Office, Excel and other software
- Adaptable, flexible, self-motivated and able to respond to frequent change
- Confident in working with multiple stakeholders
- Excellent customer service skills
- Team player
- Strong administration skills
- Strong IT and digital skills including ability to navigate online information.

Experience:

- Updating and maintaining databases accurately
- Experience of arranging and supporting events (desirable)
- Public speaking (desirable)
- Experience in an administration role

Knowledge:

- Knowledge of current health and social care priorities
- Understanding of GDPR and all other relevant Data Protection legislation

Other requirements:

- Must be fully supportive of diversity and equality of opportunity in the workplace.
- Empathy and understanding for older people, showing an interest in their concerns
- Personable with a good sense of humour

Desirable:

- Knowledge of Age UK Surrey's services