

Pension Wise Guidance Specialist

Job pack

Thanks for your interest in working at North Yorkshire Citizens Advice & Law Centre. This job pack should give you everything you need to know to apply for this role and what it means to work for us.

In this pack you'll find:

- An overview of North Yorkshire Citizens Advice & Law Centre
- An overview of the role
- The job description
- The person specification
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Jenny Veitch by emailing jennifer@northyorksca.org.uk or calling 01748 823862 ext. 1026



Overview of North Yorkshire Citizens Advice & Law Centre

We provide free, confidential and impartial information and advice on a range of issues including money, benefits, housing and employment, and campaign on big issues affecting people's lives. Our goal is to help everyone find a way forward, whatever problem they face.

We're an independent charity and part of the Citizens Advice and Law Centre networks across England and Wales. Our main offices are located in the heart of our communities in Harrogate, Malton, Northallerton, Richmond, Scarborough, Selby, Skipton and Whitby. We also have a number of outreach locations that we deliver advice from across North Yorkshire and #WeComeToYou in our Advice Bus and Advice Van.

Often, people are in crisis by the time they reach out to us, unable to see a way out of the situation they find themselves in. We provide one to one advice to tackle their immediate problem and address any underlying and overlapping issues through specialist one to one advice provided by experienced and qualified advisers and highly skilled volunteers.

We give advice face to face, over the phone, and via web chat and email. We help around 25,000 people a year on all types of issues. Our Law Centre provides specialist legal advice on housing, employment, immigration and family matters.

As an independent charity, we raise all our own money, and each of our offices has its own identity within the local community.



The role

Pension Wise is a free and impartial government service that offers people guidance on their defined contribution pension options. Citizens Advice provides appointments via telephone.

You will have the option of working remotely (from within the UK) or from one of our North Yorkshire offices (Northallerton, Richmond, Malton, Scarborough, Selby, Harrogate or Skipton).

It is essential that you are available to start the role on **4th March 2025** and can attend an online induction programme starting on **10th March 2025**. The course lasts for 3 weeks, on a full-time basis (37 hours per week over 5 days).

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.



Job description

- Provide pension and retirement information and guidance to members of the public, in line with the defined Pension Wise Service, through a medium of different channels
- To help consumers to understand the full implications of their pension choices using appropriate skills, including numerical
- 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
- Respond proactively to consumer demand, working to agreed service delivery standards
- Provide timely and accurate follow up information that adds value to the consumer and is clear and easy to understand

- Contribute towards shared best practice within the individual local office and across the local Citizens Advice (LCA) network
- Ensure that all work conforms to the Pension Wise quality standards, including undertaking peer to peer observations for quality assurance purposes, where applicable
- Ensure that all required management information is both captured and reported on a timely basis
- Complete training, continuous professional development and other requirements to gain and maintain accreditation
- 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, so that the individual is empowered to take personal action
2. Must have a good foundation knowledge of pensions' law and practice across a broad range of pension arrangements, occupational, personal and state pension
3. An understanding and appreciation of wider retirement issues
4. Proven ability in financial capability and an understanding of the issues consumers face in trying to manage their money
5. 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
6. Ability to translate complex ideas and topics into clear, concise and engaging content that the general public are able to understand
7. Ability to identify connecting advice issues and assess an individual's ability to take action
8. Effective communication skills. The ability to build a rapport, communicate confidently, sensitively and professionally, using oral and written techniques

9. 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
10. Proven organisational and time management skills
11. Flexibility and willingness to work as part of a team
12. Understanding of and commitment to the aims and principles of the LCA service
13. Understanding of, and commitment to, equality and the positive value of diversity
14. A commitment to ongoing personal and professional development including continuing professional development to gain and maintain accreditation for the role

Desirable

15. APMI or CII qualifications or equivalent in related areas would be of benefit

Requirements for role

1. Understanding of, and commitment to, the aims and principles of the Citizens Advice in which equality and diversity is embedded throughout
2. Awareness that Citizens Advice clients are at the heart of everything we do
3. Willingness to travel within the UK (including occasional overnights) and to work unsocial hours occasionally to meet tight timescales
4. Proven ability to use IT packages

Important information

Successful applicants are made a conditional offer subject to:

1. HM Government Baseline Personnel Security Standard (BPSS)
2. Successful completion and passing of accreditation training and exam
3. Satisfactory references
4. DBS check



What we give our staff

- Workplace pension scheme
- Healthy work/life balance with a 37 hour working week and flexible approach to working arrangements
- Generous annual leave of 5.6 weeks holiday and an additional 4 days at Christmas plus all public bank holidays
- Commitment to health and wellbeing – access to employee assistance programme, discounts on shopping and dining, lifestyle and entertainment
- Work related travel above mileage to designated office paid at 45p per mile
- Commitment to ongoing development – regular training workshops and personal development opportunities

We are a disability confident employer and welcome candidates who will be using access to work.