



Job description: Pension Wise Operations Leader
Hours: 37 hours
Salary: Scale SO1 pt 29 £25,951
Responsible to: Assistant Chief Executive
Based: Base to be determined

Primary Purpose

To lead the Pension Wise service in line with the targets and objectives set by the lead agency (Citizens Advice Staffordshire South West)

To work proactively with a range of staff to ensure that Pension Wise and other projects achieve the highest possible standards in service delivery. The post will lead 3.5FTE guidance specialists and a FTE administrator to deliver against contract compliance.

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

Key Tasks

1. **Planning and development**
 - Work with the Targeted Services Manager at Citizens Advice Staffordshire South West to plan the delivery of services in line with contractual targets and key performance indicators.
 - Liaise with local Citizens Advice offices in neighbouring districts to ensure a result supply of referrals and cooperation in delivering services locally.
 - Build productive relationships with our delivery venues.
 - Ensure that quality monitoring processes are updated in line with Citizens Advice guidance, and ensure staff are aware of these changes.
 - Plan efficient services to ensure utilization rates are maximised within the limits of resources.

- **Provide reports and updates as required to both the Assistant Chief Executive (Cheshire West) and the Advice Services Manager (Staffordshire South West)**
- 2. Staff management**
- **Line-manage 1.5FTE guidance specialists working within the Pension Wise project.**
 - **Regularly evaluate staff training and development needs and ensure that appropriate training is provided in a timely manner.**
 - **Follow the relevant employment policies and procedures of employing agency.**
 - **Carry out effective staff supervision and development of the Pension Wise team.**
 - **Assist staff to identify, implement and maintain methods for the effective management of workload**
 - **Ensure Pension Wise quality standards are maintained by conducting quality assessments according to Pension Wise operations guidance.**
- 3. Research and campaigns**
- **Contribute to Citizens Advice research and campaigns work at regional and national level as required.**
 - **Carry out marketing and promotion work to ensure take-up of the Pension Wise service.**
- 4. Training and development**
- **Identify and implement plans for own training and development needs.**
 - **Devise and deliver appropriate training and updates to the Pension Wise team as required.**
- 5. Other duties**
- **Undertake such other duties and tasks as may lie within the scope of this post to ensure the effective delivery and development of the service.**
 - **Promote the aims, principles, policies, interests and well-being of the organisation and protect its integrity and reputation.**
 - **Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.**
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Person Specification: Pension Wise Operations Leader

- 1. Numerical skills to understand financial matters 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 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.**
- 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 lead and work as part of a team.**
- 13. Understanding of, and commitment to, the aims, principles and policies of the Citizens Advice service.**
- 14. Understanding of, and commitment to, equality and the positive value of diversity.**
- 15. A commitment to on-going personal and professional development; we may require you to undertake training within the scope of the**

role.

16. Ability to assess performance based on an agreed quality framework.

17. Willingness to travel, possibly involving overnight stays, and working outside of core hours including evening and weekend working.

Desirable

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