

Job pack

I&A Advice Officer



Job Summary- Information & Advice Officer

About the role

Our Accredited Information & Advice Service

The Information & Advice Service is highly regarded within the London Borough of Merton and accredited with the Advice Quality Standard (AQS) and Age UK Quality Advice Standard (QAS). We have developed the service over the last five years to provide high quality advice for older people to enable them to live more healthily, happily and independently in later life.

In April 2025 – March 2026 the service worked with over 1,500 older adults across a range of issues including money and benefits, health, housing and care. During this time, we assisted older adults to generate over £820,535 of previously unclaimed benefits and make informed choices about their lives.

Job summary

The Information & Advice Officer will act as the first point of contact for older people, carers and their families contacting the advice service. The role involves providing initial information and guidance, assessing need and urgency, and ensuring clients are directed to the most appropriate support.

Alongside triage duties, the postholder will provide essential administrative support to the advice team, including following up on case outcomes and managing information resources to ensure the service runs efficiently. The role may also include delivering basic advice support, in line with training and competence.

This is an exciting time to join the organisation at a period of growth in size and reputation.

About you

You are an enthusiastic, motivated and organised individual with excellent interpersonal skills, looking for a role where you can make a real impact. You will need to have attention to detail, and strong problem-solving skills and be willing to support the complex and diverse range of issues that our clients' face.

Experience in the information and advice sector is desirable but not essential as full training will be given. What is important is your ability to work as part of a team but also using your initiative, being flexible and collaborative across the team at Age UK Merton. All our employees demonstrate our values of Quality, Integrity, Kindness, Inclusivity and Collaboration, and you will see this reflected throughout the people who make Age UK Merton a wonderful place to work.

Job Description

We are an equal opportunities employer, aspiring to reflect the communities that we serve, and we welcome applications from people of all backgrounds and experiences. We value diversity and believe our differences enrich the services we provide to local older adults. They also help us as colleagues by encouraging us to challenge ourselves, learn, innovate, and adapt.

Job title: I&A Advice Officer

Salary: Pro rata £17,316 - £18,235 (FTE is £28,860 - £30,391).

Hours: Part-time 22.5 hours per week

Responsible to: Information & Advice Manager

Based at: Age UK Merton, office based with some flexibility for hybrid working which may be considered on completion of a successful probationary period.

Contract: 12 months

Summary of duties:

- Carry out initial triage to identify client needs, priorities and any risks.
- Provide clear, accurate information on issues affecting older people (e.g. benefits, housing, health, social care and local services).
- Ensure clients feel listened to, supported and confident in the service.
- Manage expectations in a clear, sensitive and professional way.
- Identify safeguarding concerns and follow appropriate procedures.
- Refer or signpost clients to advisers, internal services or external organisations as appropriate.
- Occasionally support the advice team by delivering basic advice appointments, such as benefit checks or straightforward enquiries.
- Ensure any advice provided is within agreed competence levels and follows service procedures.
- Maintain accurate records of all advice given in line with quality standards.
- Work collaboratively with advisers, volunteers and partner organisations.

Admin and Service Support:

- Contact clients to record outcomes clearly to support service monitoring and quality improvement.
- Support advisers by ensuring smooth handovers and sharing relevant information (with consent).
- Maintain accurate and timely records on the CRM or case management system
- Ensure all case notes are clear, concise and up to date.
- Order and manage stock of information guides and leaflets, ensuring availability for clients and staff.

General Duties:

- Attend team meetings, training and supervision sessions.
- Keep knowledge up to date on local services and issues affecting older people.
- Promote the advice service in a positive and professional manner.
- Work within organisational policies including confidentiality, data protection and safeguarding.
- To liaise with external partner agencies in order to promote and deliver the service.
- To help to deliver and support events across the borough as required.
- Work closely with the teams under our new Community Support model to ensure clients receive holistic support where needed.
- Comply at all times with the policies and procedures of Age UK Merton.
- Ensure that Age UK Merton's Equal Opportunities policies, principles and practices are observed and implemented throughout service delivery.
- Carry out any other relevant tasks as required, to ensure the effective development of the organisation and the delivery of its services, this may include supporting weekend and out of hours events for time off in lieu.
- Be aware of own training needs and participate in training/education to improve performance considered relevant to the post and to achieve agreed targets.
- Act as a representative of the values, beliefs and principles of AUKM at all times.
- Undertake any other duties that are requested and commensurate with the grade and remit of the post, including supporting the Senior Management Team.
- Cover the Community Navigator Role when needed with the Community Support service team on a rota basis

Person specification

	Job title: Information & Advice Officer	Criteria
	Education and Training	
1	Educated to degree level or equivalent with a good standard of education including English and Maths and willingness to undertake training and continuing professional development as required by the post.	Desirable
	Experience	
2	At least 1 years' experience of providing information and advice to the general public.	Desirable
3	Experience of working with statutory or voluntary sector organisations is desirable.	Desirable
4	Experience of working in a team.	Essential
5	Confident handling calls from individuals who may be anxious, distressed or in vulnerable situations.	Desirable
6	Experience of researching information from written and digital sources.	Desirable
7	Ability to assess urgency and respond appropriately.	Essential
	Knowledge and skills	
8	Knowledge of housing, health, community care, money and benefits. Knowledge of local services in Merton.	Desirable
9	Excellent communication and relationship management skills, including ability to liaise effectively with people from a wide range of backgrounds, including staff, volunteers, clients and partners across the Health and Care system.	Essential
10	Highly organised with excellent attention to detail.	Essential
11	Understanding of the challenges faced by older people in accessing advice and information (sensory, cognitive, mobility etc).	Desirable
12	Willingness to undertake and update knowledge and skills with training.	Essential
13	Ability to organise your own work without direct supervision and to be able to demonstrate initiative to ensure deadlines are met.	Essential

14	Strong communication skills suitable for dealing sensitively with clients who may be vulnerable and distressed.	Essential
15	Empathetic, patient and non-judgemental approach.	Essential
16	Ability to write clear and concise action notes and client record updates.	Essential
17	Excellent IT skills particularly Microsoft word, email, Internet, and management database, such as Charity Log.	Essential
18	A sound understanding of the need for confidentiality in the role, and an ability to work to defined policies and procedures.	Essential
Other requirements		
19	Ability to demonstrate personal/ professional empathy with, and commitment to Age UK Merton's mission, vision and values as they apply to the role/ work.	Essential
20	To be committed to the principles of equality, diversity and inclusion.	Essential
21	An enhanced DBS check will be required as part of this role.	Essential

How to apply

Send your **CV and a covering letter** outlining your skills and experience in relation to the Job Description and Person Specification above to amanda@ageukmerton.org.uk
Your CV should be no more than two sides and covering letter no more than two sides also.

Please inform us by emailing amanda@ageukmerton.org.uk of any reasonable adjustments we can make to support you through our recruitment process.

Interviews will take place

If you have not heard from us within three weeks of submitting an application, you can assume that you have not been shortlisted.

General information about Age UK Merton

Age UK Merton is an independent charity operating within the national Age UK network to provide services for older adults in the London Borough of Merton. Our role is to ensure that older adults can easily access the support, services and care they need as they get older.

Our priorities

We are passionate about making a difference to the lives of older people in Merton. Our Strategic Plan outlines our three key priorities to improve health and wellbeing by:

1. Providing high quality advice and practical support
2. Building social connection
3. Creating opportunities for lifelong active ageing

Our vision

Supporting our community with opportunities to love later life

Our mission

To provide quality advice and services that meet the needs of older adults in Merton

Our values

We want to be known for:

Inclusivity – A safe, inclusive place to be for all clients, volunteers and staff

Collaboration – Working with partners across sectors to get the best outcomes for Merton's older adults

Integrity – Robust privacy and confidentiality procedures - trusted staff and volunteers

Kindness – A supportive, empathic place to work, volunteer or receive support

Quality – Providing accredited, person-centred services, respected throughout the borough

Check out our website here: <https://www.ageuk.org.uk/merton/>