

JOB DESCRIPTION

January 2026

| | |
|--|--|
| JOB TITLE: | Information and Advice Officer |
| CONTRACT TYPE: | 12-month fixed term |
| JOB PURPOSE: | To provide a high-quality Information and Advice service to older people (primarily over the telephone) and to others needing assistance with issues affecting older people. |
| ACCOUNTABLE TO: | Information and Support Manager |
| RESPONSIBLE FOR: | This post does not carry line management responsibilities |
| LOCATION: | Taunton |
| NORMAL HOURS: | Full-time: 35 hours/week worked Monday to Friday. |
| TRAVEL: | The nature of the job will not normally require travel around Somerset or North Somerset. If it is required, then it is the post holder's responsibility to provide a roadworthy vehicle. Travel expenses are paid at an appropriate rate. |
| Please note: This Job Description may be changed at any time with the agreement of the post holder to meet changed circumstances | |

MAIN DUTIES:

- To work with the Information and Support Manager and other Information and Advice Officers to provide a regular, reliable and consistent service providing relevant information and advice on issues that affect older people
- To ensure the Information and Advice service is available during the advertised times in the organisation's Central Office
- To respond to clients' enquiries principally by telephone, post or electronic mail but also in person when necessary.
- To provide accurate, up-to-date information, advice and support to clients, including welfare benefits and signposting to a more appropriate source of assistance when necessary
- To provide support to the Information and Support Manager in coordinating and supporting volunteers.
- To ensure that relevant and accurate client information is entered directly onto the organisation's client database (CharityLog)
- Attend all relevant training for Information and Advice delivery
- To represent the organisation by attending events if required

QUALITY:

- To provide a level of service in accordance with the policies and procedures required by the Information and Advice Quality Programme to comply with Age UK national standards and those of Age UK Somerset
- To produce all documentation to the professional format and standard required by the organisation
- To ensure all requested reports are delivered on time
- To maintain an efficient filing and archiving system

COMMUNICATIONS:

- To communicate professionally, efficiently and effectively with all colleagues and volunteers

ADMINISTRATION:

- To keep accurate records and to provide reports as requested by your line manager/other member of the management team
- To store, maintain and communicate data in accordance with the organisation's data protection and communication policies
- To provide own administrative support
- To ensure effective use of telephone or electronic equipment and use in accordance with the organisation's policies and procedures.

FINANCE:

- To maintain accurate and up-to-date records of expenses incurred in carrying out this role and present valid records of expenses, with receipts as necessary, on a monthly basis.

RELATIONSHIPS

- To foster and maintain good working relationships with relevant statutory authorities, voluntary organisations and other key agencies
- Develop and maintain good client relations
- To work with due regard to disability awareness and equality of opportunity
- To build positive relationships with colleagues and volunteers, with the emphasis on a collaborative approach

GENERAL

- Comply with the Statement of Responsibilities, as set out in the organisation's Health & Safety Policy.
- Comply with the Data Protection Policy and Guidelines for staff and volunteers
- Keep up to date with current trends of service provision, current practice and matters concerning older people by reading, attending courses and conferences etc.
- Represent the organisation at meetings, conferences and events where appropriate.
- Work alongside colleagues to ensure full compliance with quality standards
- Undertake any other duties as requested by and agreed with your line manager

EQUAL OPPORTUNITY

Age UK Somerset is committed to work towards equality of opportunity. The post holder will be expected to work within this context.

PERSON SPECIFICATION

EDUCATION/TRAINING

- Good standard of education with strong skills in numeracy and literacy

KNOWLEDGE/EXPERIENCE

Essential:

- Working knowledge of MS Office
- A minimum of one year's relevant experience of providing a high standard of customer care in a frontline role
- Experience of listening and questioning

Desirable:

- Previous experience of CharityLog or other CRM (customer relationship management) databases
- Previous experience of a contact centre environment or other telephone-based role involving administrative procedures in a customer-focused organisation
- An understanding of DWP benefits for older people
- Knowledge of the local area/communities

SKILLS AND ABILITIES

- Ability to work in an organised and systematic way, with key attention to detail
- Ability to deal sensitively with requests for information from older people and others, and maintain client confidentiality
- Ability to communicate appropriately and effectively, with an excellent telephone manner and face-to-face communication skills
- Ability to work accurately and to tight deadlines
- Ability to keep accurate notes and records (on paper and on the database), accessing reports as appropriate and writing routine reports if required
- Ability to deal with all enquiries, working productively independently and as an integral member of the Information and Advice team; maintaining regular, effective daily/weekly contact with the line manager and other advisers
- Self-starter, able to work in a disciplined and organised manner

GENERAL

- Commitment to Age UK Somerset's charitable aims and core values
- Flexible, positive and professional approach
- A desire to help people, using sensitivity and understanding
- Empathy with the needs of older people
- A commitment to continuous improvement and to deliver a quality service
- Willingness to use telephony equipment with direct input procedures
- Good timekeeping and attendance to meet service delivery requirements

