

## JOB PROFILE: BENEFICIARY RELATIONSHIP MANAGER

Role:	Beneficiary Relationship Manager	Date profile last reviewed:	November 2024
Name:		Reports to:	Head of Contact and Casework

### MAIN SUMMARY OF ROLE:

Within the Fund's strategy and values, the postholder will lead, manage and set appropriate standards for the Fund's beneficiary journey. Specifically, they will provide direction and leadership to the Fund's Single Point of Contact helplines and Application Coordinators to ensure the best possible beneficiary experience is delivered.

### KEY ACCOUNTABILITIES/RESPONSIBILITIES:

- Provide leadership and direction to the Single Point of Contact that includes the Welfare Navigator, Welfare Application Coordinator and Wellbeing Services teams. Overseeing the helpline aspects of the Fund's beneficiary journey programme, providing oversight and direction with its implementation, delivery, and future development.
- Review and audit performance of Team leaders to ensure quality and consistency across the teams. Monitor output against agreed Customer Service Standards.
- Be accountable for the output of the Welfare and Wellbeing Services Team, ensuring that they are appropriately managed, providing an effective output for the best possible beneficiary experience.
- Oversee and manage all means of contact for Fund beneficiaries, including Webchat, ROH, Email and Telephone.
- Provide direct line management to the Navigator and Applications Coordinator Team Leaders.
- Oversee the delivery of the Fund's contracted Listening and Counselling Service, Relationship Counselling Service and any other wellbeing services.
- Proactively develop a knowledge base of the support available for the veteran and serving community available across the sector and ensuring that this is shared across the Teams.
- Review and if necessary, decline applications where the applicant is ineligible or where the assistance sought is clearly outside of Fund policy. Support and advise the C&C Team in doing so.
- Manage relevant professional body Membership and Accreditation.
- Lead on recruitment and development of new staff as required.
- Undertake full PDR preparation duties for all Welfare Navigators, Welfare Application Coordinators and Wellbeing Service Executives and upward reporting to the Head of Contact and Casework.
- Represent the Fund's interests in relation to the COBSEO, CMS and Lighting Reach interfaces to the Funds CRM.
- Ensure that beneficiary services are accurately reflected on the Fund's website.
- As the focal point, ensure Fund services are accurately promoted to external agencies.
- Maintain Level 2 Safeguarding Adults training to enable you to respond to safeguarding incidents or alerts that arise through the helpline team, in conjunction with the Directorate DSL.
- Respond to oral or written queries from government departments, enquirers, potential applicants, helper organisations and charities, informing Head of Contact and Casework/Director Service Grants and Programmes as necessary.
- Handle and resolve escalated complaints from beneficiary and caseworking organisations in line with the Fund's Complaints Policy.
- Compile and provide statistics and reports in relation to beneficiary contact and welfare services as required by Head of Contact and Casework or DSGSP.
- Carry out any other appropriate duties as requested by the Head of Contact and Casework

### COMPETENCIES REQUIRED FOR THE ROLE

Essential	Desirable
<ul style="list-style-type: none"> <li>• Leading and supervising</li> <li>• Applying expertise and technology</li> <li>• Adhering to principles and values</li> <li>• Working with people</li> </ul>	<ul style="list-style-type: none"> <li>• Delivering results and meeting stakeholder expectations</li> <li>• Planning and organising</li> <li>• Analysing</li> </ul>

<ul style="list-style-type: none"> <li>Deciding and initiating action</li> <li>Adapting and responding to change</li> </ul>	<ul style="list-style-type: none"> <li>Persuading and influencing</li> <li>Relating and networking</li> <li>Learning and researching</li> </ul>
<b>QUALIFICATION(S), KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED FOR THE ROLE</b>	
<b>Academic or Professional Qualifications (or equivalent):</b>	
<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> <li>A minimum of three A-levels grades A – C, or equivalent</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>
<b>Knowledge/ Experience:</b>	
<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> <li>Significant experience in successfully implementing and managing the delivery of projects or services.</li> <li>Experience of managing people and allocating tasks.</li> <li>Experience of helpline and/or casework management.</li> <li>Experience of overseeing the delivery of a casework management system and/or a CRM system.</li> <li>Knowledge of safeguarding matters and trained to at least Level 2</li> </ul>	<ul style="list-style-type: none"> <li>Significant experience in successfully implementing and managing the delivery of projects or services.</li> <li>Experience of managing people and allocating tasks.</li> <li>Experience of helpline and/or casework management.</li> <li>Experience of overseeing the delivery of a casework management system and/or a CRM system.</li> <li>Knowledge of safeguarding matters and trained to at least Level 2</li> </ul>
<b>Skills/Abilities:</b>	
<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> <li>Excellent people and relationship management skills.</li> <li>Ability to analyse data sets to help determine resource requirements</li> <li>Excellent IT skills including all Microsoft Office products</li> </ul>	<ul style="list-style-type: none"> <li>Ability to network and form relationships across the sector.</li> </ul>
<b>Other Requirements:</b>	
<ul style="list-style-type: none"> <li>Must obtain a satisfactory Enhanced Disclosure and Barring Service (DBS) certificate.</li> <li>Be based at 67 Portland Place for a minimum of three days per week.</li> <li>Travel to other Fund locations in the UK (as appropriate).</li> </ul>	

I confirm this job profile has been drawn up with my full involvement and accurately reflects the responsibilities of the role.

Postholder's Signature:

NAME:

Line Manager's Signature:

NAME:

Date: