REGIONAL ADVISERS

5 roles across multiple locations

Within the Pensions Board's Financial Wellbeing Services Function

About the Church of England Pensions Board

The Church of England Pensions Board provides retirement services to those who serve or work for the Church. Both a regulated pension fund and registered charity, more than 44,000 people rely on us for their pensions. A leader in ethical and responsible investment, we carefully steward the £3.4bn of pension savings entrusted to us to not only grow our members' pensions, but also to drive systemic and lasting change across the industries and sectors in which we invest for a just and sustainable word. The Board also supports 2,500 retired clergy with housing, including managing a national portfolio of 1,200 rented homes and Community Living options.

Supported by a multi-million pound grant from the wider Church, we are setting up a new function responsible for engaging with clergy at all stages of life and ministry on their current and future plans, offering access to grants to kick-start saving, bespoke advice at key life stages and tailored products that will give our customers more choice about their future.

We are looking for five proactive, empathetic professionals to join our new team of Regional Advisers, delivering personalised support to clergy helping them with day-to-day financial wellbeing matters, and retirement planning. Working across Dioceses operating in your region, you will lead local engagement with clergy through structured one-to-one conversations, events and outreach, helping to connect individuals with expert advice, guidance, products and services that support their current and future financial plans. As a key point of contact for individuals and dioceses in your area, you'll champion the needs and experiences of clergy—feeding insight into service improvements. This is an exciting opportunity to join at the very beginning, shape how we work, and make a real impact. We're looking to build a dynamic, forward-thinking team that thrives on innovation and collaboration. If you're passionate about creating something new and delivery excellent support to clergy, this is your chance to help us set the standard.

This is a remote role, based in the region with an expectation that you combine virtual delivery with regular local travel and partnership building. Please note we are happy to consider these roles on a full time or part times basis.

Our values

We want the Pensions Board to be a great place to work. For us that starts by ensuring that everyone feels that they belong and are valued for who they are and what they contribute.

Living out our values in all that we do, we:

- Strive for **Excellence**
- Show **Compassion**
- **Respect** others
- **Collaborate**
- Act with **Integrity**

The Pensions Board, as part of the National Church Institutions (NCIs) of the Church of England, offers a safe, inclusive workplace for people of all backgrounds and walks of life. We welcome applications from people of all faiths and of no faith. We want to encourage applications from a diverse group of people who share our values. Even if you have never thought about working for us before, if you have the skills and experience, we're looking for then we would like to hear from you.

What you'll be doing

Please note that we are recruiting for 5 roles based out of the North West, North East, South West, South East and East Anglia. Therefore, please advise in your application which region you are applying for.

In this role, you will proactively engage clergy across a defined geographical area, with matters of financial wellbeing, and future retirement planning (inclusive of housing) Your initial focus, will be in offering structured one-to-one conversations to clergy in the decade or so before retirement about their future plans, helping to build confidence about what the future might hold, and connecting people to the right information, products, specialists or local support, which would help their plans. You will also co-design and run local events and learning sessions at key life stages with groups, supported by building strong relationships with diocesan teams. To do this well, you will need to build local networks, and work closely with subject matter experts and other stakeholders to escalate complex welfare or regulated financial matters.

MAIN DUTIES AND RESPONSIBILITIES

You will offer:

- Personalised Support for Clergy
    - Identify and contact clergy throughout their ministry journey to offer personalised support and guidance.
    - Hold structured one-to-one conversations online (or in person where particularly appropriate) to explore retirement plans, future housing preferences, household and financial circumstances, and agree clear next steps.
    - Maintain accurate [online] case records, schedule follow-ups and re-engage individuals at agreed intervals.
- Signposting and Referrals
    - Provide timely signposting to independent financial advisers, charities, and other external services for housing, money, and welfare needs as appropriate.
    - Build knowledge about choices and products that clergy might want to explore to help their plans, utilising our one stop shop portal.
    - Refer clergy to financial health checks and specialist advice where appropriate and track referral outcomes.
- Learning, Events, and Content
    - Design and facilitate local events, including workshops for training institutions and sessions for early-career clergy.

    - Produce and share accessible local content such as guides, newsletter items, and case studies to encourage peer learning.
- Relationship Building and Representation
    - Build and maintain relationships with diocesan recruitment and development teams, senior clergy, diocesan wellbeing staff, local Theological Education Institutions and local charitable partners.
    - Build and maintain close relationships with colleagues in the Pensions Board Housing and Pensions Admin teams, ensuring complete and accurate handover of customer information at key points in clergy retirement planning as required.
    - Attend diocesan meetings and conferences, represent the service locally, and support established pre-retirement activity.
- Mapping and Knowledge Management
    - Map local support routes, housing options, and charitable referral pathways, sharing this knowledge with clergy and others as appropriate.
- Feedback, Insights, and Continuous Improvement
    - Gather real-time feedback from conversations and events, run brief surveys, and feed insights to the wider team to inform communications, pilots, and product design.
    - Contribute to continuous professional development through training, peer learning, and sharing best practice across regions.
- Safeguarding and Quality Assurance
    - Apply safeguarding standards in all contacts (working within the Pensions Board's safeguarding policy and procedures), escalate concerns promptly, and contribute to consistent regional practice with other advisors.

Your job description is intended to reflect your main tasks and areas of work but is not exhaustive. Changes may occur over time, and you will be expected to agree any reasonable changes to your job description that are commensurate with your banding and in line with the general nature of your post. You will be consulted about any changes to your job description before these are implemented.

About You

The Church of England is for everyone, and we want to reflect the diversity of the community the Church serves across the whole country. Therefore, while of course we welcome all applications from interested and suitably experienced people, we would particularly welcome applicants from UK Minoritised Ethnicities (UKME)/Global Majority Heritage (GMH) and other underrepresented groups.

Essential

Knowledge and experience:

1. Proven experience delivering welfare, casework or financial wellbeing support in a client facing role.
2. Demonstrable experience of building and maintaining relationships across multiple organisations and working effectively in remote or matrixed environments.
3. Experience of planning, delivering and evaluating local events, workshops or learning sessions.

4. Training and demonstrable application of safeguarding practice in client work.
5. Good working knowledge of good data protection practice.
6. This role involves some travel within your designated geographical area to attend meetings, events and in-person engagements. While a lot of delivery can be virtual, applicants should have access to reliable transport and be able to travel when required. A full UK driving licence will be essential.

Skills and abilities:

7. Excellent interpersonal skills: empathetic, non-judgemental and able to build trust and influence quickly.
8. Able to provide support and deliver services through a variety of communication channels, including face-to-face meetings, telephone, email, video calls, and online platforms.
9. Comfortable adapting approach to meet the needs of clients engaging remotely or in person, ensuring a consistent and accessible service regardless of channel.
10. Strong written communication and disciplined record keeping with high attention to detail.
11. Confident user of customer relationship systems for case notes, scheduling and tracking engagement and willing to use central portal data.
12. Practical problem solver who can triage needs, make timely referrals and follow through to resolution.
13. Organised self-starter who is comfortable working autonomously, managing a varied workload and prioritising fieldwork alongside virtual delivery.
14. Familiarity with current digital engagement tools for customer support and learning delivery.
15. Committed to equality, inclusion and the values of the organisation.

Desirable

16. Experience of working in or with Church of England structures or comparable faith-sector organisations.
17. Practical knowledge of signposting to charities, housing options and welfare support; familiarity with pension matters and regulated financial products is desirable.
18. Prior involvement in designing, launching or working within a new service or pilot.
19. Formal training or qualifications in welfare benefits, debt advice or money and debt advice practice.
20. Knowledge of local housing pathways, social housing allocations and affordable housing products.
21. Experience working with independent financial advisers or regulated financial advice processes.

Vacancy Summary

JOB TITLE:

Regional Adviser

NCI ENTITY:

The Church of England Pensions Board

Housing **DEPARTMENT:**

GRADE:	Band 3	Standard Point
SALARY:	£59, 248	
WORKING HOURS:	35	
PRIMARY OFFICE LOCATION:	Home-worker	
HYBRID WORK ARRANGEMENTS:	To be based remotely	
SUITABLE FOR FULL HOMEWORKING:	☐	
HOMEWORKING REQUIRED:	☒	
CONTRACT TYPE:	Permanent (full time or part time)	
IS A DBS CHECK REQUIRED? **IF YES, WHICH LEVEL**	☒ Basic	
IS A FAITH-BASED GOR APPLICABLE FOR THIS ROLE?	☐	
ORACLE POSITION CODE:	8105064	
COST CODE:	31445	
PARENT POSITION:	Head of Customer Service	