

## JOB PROFILE: WELFARE SERVICES NAVIGATOR

Role:	Welfare Services Navigator	Date profile last reviewed:	August 2025
Name:		Reports to:	Beneficiary Relationship Manager

### MAIN SUMMARY OF ROLE:

The Welfare Navigator is responsible for supporting existing and potential beneficiaries by providing advice and information through the RAF Benevolent Fund's Welfare Helpline, email, and web chat services. This includes offering guidance on the availability of statutory support, assistance from military and non-military charities, and financial and welfare services provided by the Fund—along with instructions on how to access these resources. The role also involves delivering ongoing support where needed, and acting on behalf of beneficiaries by liaising with Case working Organisations, RAF Benevolent Fund Caseworkers, sector partners, statutory bodies, other relevant organisations, and internal Welfare Teams.

### KEY ACCOUNTABILITIES/RESPONSIBILITIES:

- Serve as the first point of contact for enquiries from members of the RAF family (serving and veteran), the public, and caseworkers. Respond positively and enthusiastically through web-based platforms, telephone helpline, email, and post, demonstrating a genuine passion for helping others from the very first interaction.
- Communicate confidently and empathetically with callers facing complex needs or difficult circumstances, including those who may be vulnerable or challenging to engage.
- Refer individuals to appropriate internal services within the RAF Benevolent Fund, or to partner agencies, for casework assistance and additional support.
- Where enquiries fall outside the RAF Benevolent Fund's remit, provide referral to alternative organisations. Offer clear advice and guidance on available support options and how to access them.
- Follow up on previous enquiries to ensure actions have been taken and offer further support to beneficiaries as required.
- Accurately create and maintain contact records in CARE (our CRM database), ensuring all beneficiary information is current and entered with precision.
- Identify appropriate caseworkers to conduct welfare assessments and make referrals via Mosaic (the shared military charity database) to initiate casework visits.
- Collaborate with both internal and external caseworkers regarding the scope of the Fund's support and the progress of ongoing applications.
- Maintain a strong and up-to-date knowledge of the RAF Benevolent Fund's welfare

services and support offer.

- Actively engage in ongoing professional development through relevant training programmes and identified learning opportunities.
- Build and maintain a comprehensive understanding of the RAF Benevolent Fund's wide range of support services, as well as alternative sources of assistance, staying informed of any updates or changes within the welfare support landscape.

#### COMPETENCIES REQUIRED FOR THE ROLE

Essential	Desirable
<ul style="list-style-type: none"> <li>• Following Instructions and Procedures</li> <li>• Coping with pressures and setbacks</li> <li>• Planning and organising</li> <li>• Writing and reporting</li> <li>• Working with people</li> <li>• Adhering to Principles and Values</li> </ul>	<ul style="list-style-type: none"> <li>• Deciding &amp; Initiating Action</li> <li>• Coping with Pressures &amp; Setbacks</li> <li>• Adapting &amp; Responding to Change</li> <li>• Presenting &amp; Communicating Information</li> <li>• Achieving Personal Work Goals &amp; Objectives</li> </ul>

#### QUALIFICATION(S), KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED FOR THE ROLE

##### Academic or Professional Qualifications (or equivalent):

<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> <li>• A good level of general education – minimum of three A-Levels or equivalent.</li> </ul>	<ul style="list-style-type: none"> <li>• Evidence of Continuing Professional Development (CPD)</li> </ul>

##### Knowledge/ Experience:

<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> <li>• Solid knowledge of statutory and charitable support available within the welfare and military charity sectors.</li> <li>• Experience using database and CRM systems, including retrieving, interpreting, and actioning data and correspondence accurately.</li> <li>• Prior experience handling helpline calls or supporting vulnerable individuals in sensitive or challenging circumstances.</li> <li>• Strong background in administrative tasks, including data entry, with a high level of accuracy and attention to detail.</li> </ul>	<ul style="list-style-type: none"> <li>• An understanding of the structure, culture, and unique needs of serving personnel, veterans, and their families.</li> <li>• Awareness of key organisations within the military charity sector and how they interact to provide coordinated support.</li> <li>• Previous use of Mosaic (shared military charity database) or similar systems used for casework and welfare management.</li> <li>• Awareness of safeguarding principles and procedures when working with vulnerable individuals or sensitive cases. Understanding of GDPR and best practices for handling personal and sensitive data securely and appropriately.</li> </ul>

##### Skills/Abilities:

<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Attention to Detail</li> </ul>

## **Signature**

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: