

Recruitment Pack

Generalist Adviser Energy

Date: April 2024



Introduction from Jon Perry, Chief Executive

Thank you for taking the time to consider applying for a job at Coventry Citizens Advice. We are one of the largest Citizens Advice organisations in the country, helping around 10,000 people per year with over 50,000 issues. We identify and help secure nearly £13 million in financial gains which clients either did not know about or hadn't accessed before.

We want to make society fairer, and we do that with each client, helping people find a way forward for their individual problems, and by influencing how the policies of the local authority, government, and the private sector impact on our clients' lives.

The world has changed considerably recently and so have we. We have invested in our IT infrastructure with Office365 so our workforce is agile, and clients can still access our services when they need us the most. We have revised our services to ensure that we are flexible and can meet the changing demands for our services.

We are facing an unprecedented cost of living crisis. Most people's incomes haven't grown for years. They are being squeezed by high inflation, rising energy costs, and increasing mortgage and rental rises. Many people are struggling to pay back debts and are dealing with employment, family, consumer, housing, and other issues.

We are always looking for ways to improve our services and work more closely with partners. This means new opportunities to experiment locally through co-design and partnerships across a range of different sectors. We are looking for people who can think about how things could be done differently to be more effective and efficient and bring their ideas to the table for discussions with their peers.

Working for Coventry Citizens Advice is extremely rewarding due to the positive impact and high-quality service we provide for our clients. Our clients are fundamental in what we do, and our Values are key to how we work across the charity. Prior to applying, please ensure that you understand and agree with our Values, which can be found below.

Coventry Citizens Advice offers an array of different services which provide opportunities to learn new skills and understanding about wider services. More information on our different service areas can be found on our website www.coventrycitizensadvice.org.uk/projects.

Thank you for your interest in applying for a role within Coventry Citizens Advice and good luck in your application.

Our Values:

Our core values as an organisation are: Professional, Accessible, Innovative and Empowering. We look to embed them in every aspect of the work we do, how we behave and how we support each other. Together we ensure that our values are brought into behaviours that we demonstrate every day so that we can offer the best possible service to our clients. We have a Behaviour Framework for all staff and volunteers, and everyone at all levels of the organisation strives to work in this way:



We are professional because we are:

Respectful

- We respect all people we work with including clients, colleagues and those from funders and external agencies, treating them equally, and without judgment.
- We respect external agencies, funders, colleagues when negotiating on behalf of clients to ensure the professional reputation of the organisation.
- We remain impartial in the way we deliver advice, respecting and appreciating the diverse nature and culture of our community.
- We talk about our work and our clients in a way that upholds and reinforces confidentiality and privacy.
- We respect colleagues, share best practice with each other, work as a team, acknowledging our different strengths and helping each other to deliver quality advice and guidance.

Accountable

- We are accountable for our own actions and decisions in line with National Citizens Advice guidance and standards required under our AQS accreditation and FCA registration.
- Our managers are accountable to motivate, lead and manage their teams within set guidelines.
- We are accountable to our funders, to deliver our service to the standards, outputs, outcomes, and timescales we agreed.
- We are accountable to our clients, to ensure that the advice we give is correct, current, and does not disadvantage them; or lead to detriment.
- We are personally accountable to act in a way that upholds the reputation of CCA, by way of adhering to our HR Policies and Procedures.

Ethical and Lawful

- We are ethical and lawful because the advice/guidance we deliver is researched using recognised and reputable sources such as CPAG, Advisernet. Our advice adheres to the Principles, Rules and Guidance detailed in the FCA Handbook.
- We are bound by and comply with the rules of GDPR.
- We adhere to the National principles of Confidentiality, Independence Impartiality and the service being free of charge.

- We work with clients, advising them about what they are entitled to in terms of benefits and other financial and practical support, seeking to maximise their income or to find a way forward within lawful boundaries.
- We identify that advice and assistance complies with statute, regulation, common law and guidance in respect of such matter as equality and diversity, data protection and consent, health and safety and client care.

Effective at Building Resilience

- We build resilience by educating and teaching our clients how to effectively respond to issues and to resolve them before crisis point.
- If a client is at crisis point, we not only advise them about the best routes to resolve the issues, but also support strategies to avoid repeating the situation.
- We build Resilience amongst staff and volunteers by providing ongoing training and by sharing best practice across the organisation to build a flexible and resourceful team.
- We assess the skills, knowledge and aptitudes possessed by individuals within the organisation to ensure that we can provide advice and assistance without errors and any financial loss or damage to our reputation.

Empowering

- We follow the National Citizens Advice framework which emphasises putting clients in control, using tools, guidance and directed self-help wherever we can. Where self-help isn't appropriate, we advise clients of the available options and consequences so they can choose the right option for their needs.
- We seek to empower colleagues to be both innovative and creative, and to find solutions themselves before seeking support to build their confidence in their work.
- We provide constructive and fair feedback with a purpose to empower colleagues and strengthen the quality standards and effectiveness across the organisation.

Work Collaboratively

- We work collaboratively to ensure the most appropriate outcome for clients. We do this by sharing best practice, experience, and knowledge, referring internally between projects, by promoting the work of other projects, providing training and development opportunities for staff and volunteers and embedding a broad teamwork approach.
- We recognise that different individuals, agencies, teams, and communities comprise a wealth of skills, knowledge and expertise.
- We recognise the power of partnership working and seek to signpost clients to other agencies who are better placed to meet needs that are outside our scope.

Communicate Effectively

- We value our team and communicate this effectively to assure everyone they are valued as part of our CCA team.
- We listen to one another, and we contribute to discussions and problem solving.
- We take responsibility for the messages we deliver and how they are communicated. We are engaged listeners and we communicate openly and honestly.
- We use language that is plain and designed to be understood by everyone.
- We use languages and methods of communication other than spoken or written English where appropriate, including Makaton and BSL.
- We make effective use of translation and interpretation services to benefit clients and communities.

Supportive

- We are a team of individuals working towards the same goal. This promotes positive mental health and wellbeing.
- We help to facilitate and provide encouragement to support clients and colleagues achieve their goals. We give thought to our actions and communication to ensure that what we say and do supports the aims of our clients and our colleagues.
- We praise success.
- We don't discriminate or judge.

About Coventry Citizens Advice

Coventry Citizens Advice is a progressive organisation that has been able to continually innovate and develop new services over the course of the 80 plus years it has been running. Coventry Citizens Advice has been able to demonstrate excellence in a number of areas and been commended for its volunteer training, information service and partnership working. We are multi local and national award winners in areas of Research & Campaigning, Service Development and Money Advice.

Coventry Citizens Advice has a Trustee Board, all of whom bring professional skills and knowledge of the city and are responsible for setting the strategy and budget for the service. Day to day responsibility for the running of the organisation sits with the Chief Executive who, alongside the Client Services Director, oversees the day-to-day running of local Citizens Advice office services.

The organisation has around 45 paid members of staff and is proud to have more than 40 volunteers working for it in some capacity throughout the course of the week.

Our busy core services operate daily, and clients can contact us for advice online and on the telephone. We are offering face to face appointments for those clients whose needs cannot be met digitally or by telephone.

The organisation's service has embarked on exciting partnerships with a range of private sector organisations such as National Grid to offer energy advice and support, with Barclays Bank to increase financial capability, and with Coventry Building Society to help with digital inclusion.

We continue to work with existing and new partners across all three sectors to deliver quality services to the most vulnerable in our society and to help people out of crisis.

Other benefits

We also offer a range of additional benefits:

- Flexible working arrangements
- Fees paid for membership of relevant professional bodies
- Regular professional development
- Health & Wellbeing services provided through Occupational Health, and Employee Assistance Programme TELLUS
- Cycle to Work Scheme

- Free eye tests and contribution towards lenses/spectacles for Computer users if appropriate
- Discounts on leisure facilities and a range of discounted offers

Conditions regarding offers of employment

If you are successful and are offered a post, you should be aware that we would offer the post conditionally in the first instance, whilst we follow up on your references, DBS (Disclosure and Barring Service) check (if appropriate), health clearance and your right to work in the UK as detailed below:

Security Clearance

Any offer of employment will be subject to satisfactory completion of a security and pre-employment checks which for this role include DBS checks with Disclosure and Barring Service. The level of DBS check required for this post is: **Basic**. Further information about the security checking procedure is available on request.

Health Clearance

Any offer of employment will be subject to satisfactory completion of a Health Questionnaire, and should you disclose any health issues, then any offer of employment will be subject to a satisfactory assessment by Occupational Health. Occupational Health will identify whether there are any reasonable adjustments which can be made to support you at work.

Right to work in the UK

Under United Kingdom immigration rules, it is a criminal offence to employ a person who is subject to immigration control and who has not been granted leave to enter or remain in the UK or does not have permission to remain in the UK.

Coventry Citizens Advice therefore has a legal obligation to carry out document checks to ensure that you have a legal right to work in the UK. It is also a requirement that we retain copies of the relevant documents.

To avoid potential unlawful discrimination claims we will carry out appropriate checks on all candidates.

How to Apply

Application Form

Please complete the application form as we do not accept CVs. Do note that when shortlisting we base our scoring and decision making on the answers you provide in Section 2 of the application form. This section allows you to provide evidence of your experience, knowledge, skills, and abilities that are relevant to the role as described in the role profile. Selection is based on an assessment of the evidence you provide against the requirements of the role as set out in the person specification. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities.

Please provide one example for each requirement in the person specification (found in the Recruitment pack). You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it and the outcome or result of your actions.

Please note that there is a word limit of 200 words per criterion.

A useful guide is the S.T.A.R. method:

- **Specific** – give a specific example
- **Task** – briefly describe the task/ objective/ problem
- **Action** – tell us what you did
- **Results** – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family or home responsibilities, can also be given.

Disability

Coventry Citizens Advice is committed to the employment and career development of disabled people. As a Disability Confident employer, we guarantee an interview to any candidate with a disability whose application meets all of the essential criteria for the post.

If you would like to apply for the Guaranteed Interview Scheme, please ensure that you tick the box you will find on the application form for the scheme.

If you consider that you have a disability under the Equality Act 2020 and require any reasonable adjustments to be made in the recruitment process or at work subsequently if appointed, please make sure you tell us separately. We follow the social model of disability which believes that it is the barriers created by society which disable people. We will use reasonable adjustments wherever possible to remove those barriers.

Equality and Diversity

We recognise the benefits of having a diverse workforce and will take steps to ensure this. If you would like to see our Equality and Diversity policy, please let us know and we will provide you with a copy.

Instructions

The closing date for applications is **29 April 2024 at 09:00am.**

Interviews to be held **week commencing 29 April 2024**
(in the event that you are shortlisted, you will need to be available in this week).

Coventry Citizens Advice interviews will draw out the skills and competencies required for each role. As part of our recruitment process for this role, we may ask you to undertake a Technical Test on the day of the interview, the details of which you will receive on the day. We will use the Technical Test as part of the overall scoring for the recruitment process and consider the score an integral part of our decision making.

Please email your application to: recruitment@coventrycab.org.uk.

If you are unable to make an electronic application, you may submit your application on paper and post to:

c/o HR, Coventry Citizens Advice, Kirby House Little Park Street Coventry CV1 2JZ

Please ensure your application arrives before the deadline.

Selection Process

After the closing date we will consider all applications carefully and invite those candidates who appear, from the information available, to be the best-suited for the post to interview.

It is important therefore that your application gives a full but concise description of the nature, extent, and level of the responsibilities you have held.

If selected, details of the interview process will be sent to you by email or letter.

Travel Expenses

We do not pay for interview expenses; however, we may reimburse candidates on means tested benefits for reasonable travel expenses to attend an interview if prior authorisation has been obtained.

Data Protection and how we will use your information

We will use your application only to inform the selection process - this is our 'legitimate interest' under data protection law. Your application will be kept on record for 12 months after which we will destroy it. If you are successful, it will form the basis of your personnel record with us and we will store it in a manual file. We will hold any data about you in completely secure conditions with restricted access.

Diversity Monitoring

We will include data that you provide on the diversity monitoring form in a general database for statistical monitoring purposes only enabling us to monitor our effectiveness of our policy on Equal Opportunities and Employment. Individuals will not be identified by name.

We shall consider that by submitting the enclosed forms you are giving your consent to the processing of your data in the ways described above.

Job Description & Person Specification

Coventry Citizens Advice

Generalist Adviser Energy

Salary:	£25,324
Hours:	37 hours per week – part time hours will be considered
Responsible to:	Energy Team Leader
Based at:	Coventry Citizens Advice Head Office Hybrid working subject to negotiation

The Service

Coventry Citizens Advice (CCA) has successfully delivered a dedicated energy advice service to its clients since November 2014. In February 2023, funding was granted to enable the continuation of the National Grid funded Power Up Project, as well as Energy Advice Programme funded by the National Citizens Advice.

The combination of these opportunities has enabled CCA to enhance its energy advice offer to encompass the continuation of dedicated 1-2-1 multi-channel support, in addition to a programme of outreach events across Coventry.

purpose of the Role

This role will add capacity to the Energy Team. The purpose of the role is to provide generalist advice with a focus on energy (traditional and low carbon technologies) and income maximisation, to clients, particularly to those who are in or at risk of fuel poverty. This will be 1-2-1 advice via different channels, e.g., telephone, face to face, and digital.

Our ideal candidate will have experience of delivering advice to vulnerable clients facing financial hardship.

Key Responsibilities

1. Advice

- Provide advice and information to clients on a 1-2-1 basis, primarily by telephone, but also digital channels and face to face, to help them manage their home energy with specific focus on income maximisation,

energy efficiency, heating solutions, smart and low carbon technologies, and the behavioural changes they can take to help their individual situation,

- Ensure income maximisation through benefits entitlement check, non-monetary debt assistance, and signposting to energy grants,
- Refer client internally within Coventry Citizens Advice services or signpost to other specialist agencies, the local authority or partners as appropriate,
- Ensure where possible advice leads to positive outcomes for the client, enabling them to feel more confident in their understanding of energy issues,
- Attend outreach events to promote the CCA Energy Service and follow-up individual client queries,
- Provide peer support to other generalist energy advisers within the CCA Energy team.

2. Service output

- Ensure the delivery of individual targets and support the delivery of the wider targets for the Energy Project team,
- Provide statistical information related to project's performance in-line with funder requirements.

3. Administration

- Maintain detailed case records using the Casebook system, meeting the requirements of the Operational Policies, and Citizens Advice's Advice Quality Standards (AQS),
- Ensure all data and service information is communicated promptly and that client information is stored securely in-line with CCA Information Assurance and data protection policies,
- Maintain a high level of quality advice through active involvement in independent file reviews across all CCA services.

4. Continuous professional development

- Be an active member of relevant energy forums, for example the Citizens Advice Energy Workplace group,
- Engage in continuous development of skills as a competent generalist adviser, with a focus on understanding of needs of the client group including undertaking required energy advice Skillbook modules.
- Attend internal and external training as agreed with the Energy Team Leader.

5. H&S / R&C

- Comply with all relevant CCA Health and Safety Policies and Procedures.

- Support Citizens Advice research and campaigns work by raising social policy issues, providing case studies and feedback on issues of concerns and trends identified.

This job description is an outline only and the post holder will be expected to carry out other duties commensurate with the role.

Person specification

Criteria	Essential
1.	Commitment to Citizens Advice Aims, Principles and Policies, equality and diversity and its application in the delivery of advice.
2.	At least one year's recent experience in delivering generalist advice to clients experiencing financial hardship.
3.	Understanding of issues affecting clients impacted by the cost of living and energy crisis.
4.	Excellent interpersonal skills and the ability to build strong working relationships with fellow team members, clients, and external partners.
5.	Able to work to challenging targets through independent management of workload and setting priorities.
6.	Demonstrable experience of keeping accurate and detailed records of all work undertaken with clients, in line with Citizens Advice quality requirements.
7.	Good numeracy and IT skills. Ability to work with MS 365 suit including excel spreadsheet.
8.	Committed to continuing professional development with a willingness to undertake further training to deliver the most up-to-date information to clients.
9.	Able to travel independently across Coventry to outreach venues as required.
10.	Willingness to deliver energy briefings and workshops to clients in outreach settings.

	Desirable
1.	Completion of the Citizens Advice Generalist Training and/or Energy Modules on Skillbook.
2.	Experience/understanding of the energy market.
3.	Experience in using benefits calculation tools and Casebook client data management.