

Recruitment Pack

Money & Benefits Adviser

Date: July 2025



Introduction from our Chief Executive, Simon Richards

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 more than 13,000 clients per year with over 30,000 issues. We identify and help secure over £8 million in expected 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 way we deliver services is changing and we are providing advice more and more in the community and our workforce, both volunteer and staff, reflects that community.

You will know that we are in challenging financial times and incomes are being squeezed by rising inflation, energy costs, and increasing cost of housing. Many people are struggling to pay back debts and are dealing with employment, family, consumer, housing, and other issues.

Working for Coventry Citizens Advice is extremely rewarding due to the positive impact and high-quality service we provide for residents. Our clients are fundamental in what we do, and our values are key to how we work across the charity. It is important to us that volunteers and staff share our values, which can be found below.

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

A handwritten signature in black ink, which appears to read 'Simon Richards'.

Simon Richards

Our Values:

Our core values as an organisation are: Respect, Inclusion, Accountability, Professionalism. 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 demonstrate:

Respect and Inclusivity

- Treat all colleagues, clients, and stakeholders with respect, regardless of race, gender, age, religion, disability, sexual orientation, or socioeconomic status.
- Listen actively and empathetically to clients and colleagues, valuing their perspectives.
- Avoid any language or behaviour that could be perceived as discriminatory, harassing, or bullying.

Communication

- Communicate clearly and effectively, ensuring that language is appropriate for the audience.
- Maintain confidentiality regarding client information and sensitive internal matters.
- Use non-judgmental, person-centred language that is supportive and respectful of individual circumstances.

Professional Integrity

- Ensure that all advice provided is accurate, impartial, and in line with the standards set by Coventry Citizens Advice.
- Seek to continuously improve knowledge and skills through professional development and training.
- Be transparent in decision-making processes and acknowledge mistakes or misunderstandings openly.

Collaboration and Teamwork

- Foster a culture of collaboration where staff, volunteers, and partners work together for the benefit of clients.

- Share knowledge and information openly with colleagues to enhance the quality of advice and support offered.
- Support and mentor less experienced staff and volunteers, contributing to a positive and supportive work environment.

Person-centred Approach

- Prioritize the needs of clients, ensuring that advice is tailored to their individual circumstances and delivered in a respectful manner.
- Engage clients in decision-making about their cases, ensuring they are empowered to take informed steps.
- Avoid any behaviour that could exploit or manipulate vulnerable clients.

About Coventry Citizens Advice

Coventry Citizens Advice is a progressive organisation that has been able to continually innovate and develop new services. 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 a wide range of areas including 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 oversees the day-to-day running of local Citizens Advice office services.

We have an increasing number of projects all of which work collaboratively to deliver the best outcomes for the residents we work with.

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 Employee Assistance Programme 'Health Assured'
- Specialised professional support for a range of issues through 'Peppy'
- Cycle to Work-Scheme

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

Conditions regarding offers of employment

If you are successful and are offered employment, 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: **Enhanced.**

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 that might affect your ability to work, 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.

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 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. Further information on this is available on request.

How to Apply

Application Form

Please complete the application form as we do not accept CVs.

Please 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. 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.

Instructions

There is no closing date for the applications. We will keep the post open until we recruit the right candidate.

Shortlisted candidates will be given an opportunity to visit Myton Hospice.

Interviews will commence on a rolling basis.

Where we ask you to give a presentation or complete a technical test on the day, we will provide you with further details and indicate the time you have available, as well as making sure you have the resources available to complete the task.

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:

Recruitment, Coventry Citizens Advice, 1-7 Station Street East, Foleshill, Coventry CV6 5FL.

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 an interview session.

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 digital 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

Myton Hospices Money & Benefits Advisor

Salary:	£32,690 per annum
Contract:	Fixed-Term Contract until May 2026
Hours:	37 hours per week (full-time) (Part-time hours will be considered)
Responsible to:	1- Macmillan Team Leader, 2- Health and Wellbeing Project Manager
Based at:	This post involves advising clients at three Myton Hospice sites, The incumbent will be expected on occasion to attend meetings at Coventry Citizens Advice premises

The Service

The Myton Hospices believe everyone should live well towards the end of their life and have the right to a good, natural death, the way they want it to be, where they want it to be and with their loved ones supported.

The Myton Hospices money and benefits advice service, delivered by Coventry Citizens Advice and funded by Macmillan, will provide holistic support to patients and their families, who are receiving care and support in the Inpatient Units at both the Coventry and Warwick Myton Hospice sites.

This role is an integral element of the Hospice's wider aim to provide high quality holistic care and support to enhance the quality of life and wellbeing for patients; promoting dignity, individual choice and support for their families/carers.

There is a target for 5 people per calendar month to receive full casework.

Role description

This role will work in partnership with Myton Hospices and Macmillan Cancer Support to provide specialist advice and support to patients and their families. The post holder will work as an integral member of the Myton Multidisciplinary team; they will receive referrals from the medical and nursing teams.

Key Responsibilities

Our ideal candidate will have significant experience delivering advice, including at casework level to vulnerable clients facing financial hardship.

At this stage, funding from Macmillan Cancer Support has been agreed until May 2026.

The Macmillan Advisor will work in partnership with Myton Hospice to:

- Meet with patients and their families to provide initial support and complete applications for areas including benefits, income maximisation, budgeting, end-of-life planning, housing, and employment
- Undertake follow-up casework and advocacy on behalf of the individual e.g. drafting applications for mandatory reconsideration and appeals.
- Signpost to other specialist services where required, either internally within CCA or to external partners
- Promote the service to Myton Hospice staff, providing basic training on identification of financial requirements of patients
- Maintain a clear referral route between Myton Hospice staff and the Advisor
- Attend Myton Hospice Multidisciplinary Team meetings in addition to CCA team meetings
- Ensure that any temporary changes to service delivery, e.g., annual leave, are communicated within Myton Hospice.
- Provide peer support to other specialist benefits advisers within the CCA Health and Wellbeing team.

In addition to client-facing advice work, the Advisor will:

Service outputs

- Ensure the delivery of individual service targets and support the delivery of the wider targets for the CCA Health and Wellbeing service
- Provide statistical information related to service performance in-line with funder requirements

Administration

- Maintain detailed case records using the Casebook system, in line with the requirements of the Operational Policies, Citizens Advice - Advice Quality Standards (AQS) and Macmillan Cancer Support.
- 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

Continuous professional development

- Attend and participate in any relevant forums as detailed by Macmillan Cancer Support and national Citizens Advice
- Engage in continuous development of skills as a competent specialist adviser,

- with a focus on understanding of needs of the client group
- Attend internal and external training as agreed with the Service Manager
- Keep up to date with legislation, case law and policies and procedures
- Develop working relationships with other professionals working with the client group, network with other professionals in the advice work field and represent the project at meetings with other agencies as appropriate in agreement with Service Manager

H&S / R&C

- Comply with all relevant CCA and Myton Hospices' Health and Safety and all other relevant Policies and Procedures.
- Support Macmillan Cancer Support/Citizens Advice research and campaigns work by providing case studies and feedback on issues of concerns and trends identified

Person Specifications

CRITERIA	ESSENTIAL
1.	At least one year's recent experience in delivering specialist benefits advice to vulnerable clients facing financial hardship
2.	Demonstrable understanding and recent experience of delivering casework
3.	Competent in providing support to clients face-to-face and via telephone, MS Teams and email
4.	Ability to build rapport quickly with clients who may be vulnerable and distressed at times
5.	Ability to maintain personal resilience and wellbeing, whilst working with vulnerable patients with a range of life limiting illnesses, and their family members
6.	Effective oral and written communication skills with particular emphasis on negotiation, representation and reporting on behalf of clients, and with other stakeholders
7.	Good working knowledge of peripatetic working and use of IT to support working in a distance role from a Head Office
8.	Ability to build relationships with external partners, taking the lead in presenting a service to them
9.	Good numeracy skills with the ability to carry out efficient benefit calculations and prepare budgets for clients
10.	Ability to prioritise tasks, to manage a caseload, to identify and work to deadlines and to manage time effectively under own initiative

11.	An understanding of the need for confidentiality and a non-judgmental approach to advice provision
12.	Ability to work as part of a team and in partnership to ensure effective delivery of the project across a wide geography
13.	An understanding of social policy issues and their implications for clients and the service, and to respond to emerging issues
14.	IT and keyboard skills for case recording and statistics independently
15.	Experience in working independently and self-managing

	DESIRABLE
16.	Have a valid driver's licence.