

Recruitment Pack

Generalist Energy Adviser

Date: August 2026



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: **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 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 note that there is a word limit of 200 words per question.

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

Deadline for applications is Monday, 10th August 2026 @ 5pm.

We may consider late applications at our discretion.

Interviews will take place on the weeks commencing 17th August 2026.

We would like the successful candidate to start as soon as possible.

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.

Coventry Citizens Advice Energy Advice Service

Job Description & Person Specification

Role:	Generalist Adviser Energy
Salary:	£26,798 per annum pro rata
Hours:	37 hours per week
Responsible to:	Energy Team Leader
Employed by:	Coventry Citizens Advice (CCA)
Based at:	CCA main offices / from home / outreach venues

The Service

Coventry Citizens Advice (CCA) has successfully delivered a dedicated energy advice service to its clients since November 2014. We are currently funded by National Grid to support a range of vulnerable clients in the community, assisting them in their energy needs in a number of different ways.

This opportunity enables 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.

Role description

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.

The Generalist Advisor will:

- 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.
- Undertake any other tasks that may be reasonably required by the employer within the role.

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

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.

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.

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 energy advice modules on Skillbook,
- Attend internal and external training as agreed with the Energy Team Leader.

Health and Safety & Research and Campaigns

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

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	Subject matter expertise in the energy industry in how it affects retail customers.
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.
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
11	Completion of the Citizens Advice Generalist Training and/or Energy Modules on Skillbook.
12	Experience/understanding of renewable technologies.
13	Experience in using benefits calculation tools and Casebook.