

Recruitment Pack

Generalist Adviser

(Financial Resilience Coventry Project)

Date: September 2026



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, appearing 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 Friday, 30th October 2026 @ 4pm.

We reserve the right to close the advert early if recruitment is complete.

Interviews will take place on a rolling basis. We will invite candidates as they submit their applications.

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

Generalist Adviser

Job Description & Person Specification

Role:	Generalist Adviser
Salary:	£29 525.00 pro rata
Hours:	Part-time (<37 hours) and Full-time (37 hours) available
Contract:	Permanent (Subject to funding)
Reports To:	Project Manager/ Team Leader
Employed by:	Coventry Citizens Advice
Location:	Coventry Citizens Advice Offices, outreach and remote working as required

Purpose of the Role

The Generalist Adviser will support Coventry residents referred to the service to move from immediate financial difficulty towards greater stability and independence. The postholder will complete holistic assessments, agree personalized action plans and provide practical advice and casework on income maximisation, household costs, benefits and financial capability. They will recognise when regulated debt or other specialist advice is required and arrange an effective referral to partners organisations.

Key Responsibilities

Holistic Assessment and Action Planning

- Contact allocated residents promptly and work within the service requirement for initial contact within three working days.
- Interview residents sensitively by telephone, face-to-face, email or agreed remote channels, adapting communication to disability, language, literacy, digital access and other needs.
- Complete a structured assessment of income, expenditure, debt, benefits, housing, employment, caring responsibilities, vulnerability, digital access, immediate risks and previous financial support.
- Understand the resident's priorities, strengths and capacity to act, identifying both the immediate problem and the underlying causes of financial hardship.
- Agree a clear personalised action plan setting out intended outcomes, actions, responsibilities and timescales, reviewing it as circumstances change.
- Recognise emergencies, safeguarding concerns and risks to essential services or housing, taking prompt action and escalating appropriately.

Generalist Advice and Financial Support

- Check benefit entitlement, support claims and challenges within competence, and identify other opportunities to increase household income.
- Help residents understand and manage income and expenditure, develop realistic budgets and strengthen practical financial capability and confidence.
- Support residents to reduce essential expenditure and access appropriate grants, trust funds, discounts, concessions and social tariffs.
- Help residents address priority financial pressures through practical action, negotiation and contact with relevant organisations where appropriate.
- Provide proportionate casework across connected issues and follow agreed actions through rather than relying on signposting alone.
- Identify debt requiring regulated or specialist intervention and make a timely referral to a Money Adviser.
- Identify wider housing, employment, energy, health, digital or social needs.
- Coordinate referrals to the most appropriate internal or external service.

Client Engagement and Follow-up

- Make and record agreed contact attempts, including unsuccessful contact, and follow the service's engagement, no-response and case-closure procedures.
- Maintain purposeful contact with residents while casework is active, explain progress clearly and support them to complete agreed actions.
- Complete required follow-up activity, including six- and 12-month reviews, to establish whether outcomes remain in place and whether further support is needed.
- Gather appropriate feedback, outcome evidence and client stories to support evaluation and demonstrate the difference made by the service.

Quality, Recording and Performance

- Maintain accurate, timely and detailed Casebook records, including assessments, action plans, advice, referrals, contact attempts, evidence, outcomes, financial gains and case status.
- Record activity in accordance with agreed funder categories, evidence standards and KPI requirements, responding promptly to recording or data-quality queries.
- Manage an allocated caseload, prioritise urgent work and meet contact, casework, follow-up and reporting deadlines.
- Ensure work complies with Citizens Advice quality standards, safeguarding procedures, UK GDPR, confidentiality, consent and information-sharing requirements.
- Participate positively in supervision, case checking and improvement activity, using feedback to maintain safe and consistent practice.

Partnership and Team Working

- Work closely with the Referral and Performance Administrator, Team Leader, Money Advisers and other Citizens Advice teams to provide a coordinated resident journey.
- Maintain constructive relationships with the funder, referral teams and community partners, providing appropriate progress information within consent and information-sharing arrangements.
- Contribute to a supportive, accountable and inclusive team culture, sharing knowledge and raising emerging operational or client risks promptly.
- Deliver appointments flexibly across agreed office, outreach, telephone, email and remote channels, including appointments outside normal hours where arranged to meet client need.

Research, Learning and Organisational Responsibilities

- Identify recurring problems, barriers and gaps in local provision, recording and sharing evidence through Citizens Advice research and campaigns channels.
- Keep knowledge of welfare benefits, financial capability, household-cost support, local services and relevant policies and procedures up to date.
- Complete the structured service induction and other mandatory or role-specific learning, taking responsibility for continuing professional development.
- Uphold the aims, principles and policies of Citizens Advice, including equality, diversity and inclusion, health and safety and dignity at work.
- Carry out other duties reasonably compatible with the purpose and level of the role.

Person Specification

Criteria	Requirement
Essential	1. Experience of providing person-centred information, advice or casework to people with complex or sensitive needs for at least 1 year. 2. Generalist knowledge of welfare benefits and other common issues affecting financial stability, with the ability to research and explain options accurately. 3. Ability to complete holistic assessments, identify underlying needs and agree clear, practical action plans with residents. 4. Ability to support income maximisation, budgeting, household-cost reduction and practical financial capability within the boundaries of the role.

Criteria	Requirement
	5. Understanding of the boundary between generalist financial support and regulated debt advice, including when to seek specialist input or make a referral. 6. Effective listening, questioning and communication skills, with the ability to adapt support to individual access needs. 7. Ability to manage a caseload, respond to urgent situations and meet fixed deadlines while maintaining accurate records. 8. Confident use of case-management systems, online resources and Microsoft Office applications. 9. Understanding of safeguarding, confidentiality, UK GDPR, equality and accessible service delivery. 10. Ability to work independently and collaboratively, with a commitment to continuous learning and the aims and principles of Citizens Advice.
Desirable	11. Experience of working within Citizens Advice or another advice, financial inclusion or commissioned service. 12. Experience of benefit claims or challenges, grants, social tariffs, budgeting support or income-maximisation work. 13. Knowledge of Coventry communities, referral pathways and services available to residents experiencing financial hardship.