

Recruitment Pack

Referral and Performance

Administrator

(Financial Resilience Coventry Project)

Date: September 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 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 Referral and Performance Administrator

Job Description & Person Specification

Role:	Referral and Performance Administrator
Salary:	£25 878.00 pro rata
Hours:	28 Hours per week, worked across five days (6 hours per day)
Contract:	Permanent (Subject to funding)
Reports To:	Team Leader / Project Manager
Employed by:	Coventry Citizens Advice
Location:	Coventry Citizens Advice Offices with remote working as required

Purpose of the Role

The Referral and Performance Administrator is a key delivery role within our CORE Project. The postholder will manage the front end of the referral pathway, ensuring that residents enter the service promptly, referrals are complete and accurately recorded, cases are allocated appropriately, and no resident is lost in the process. The role provides the central control point for referral workflow, contractual deadlines, performance information, follow-up activity and feedback to referring partners.

Key Responsibilities

1. Monitor incoming referrals from agreed partners throughout each working day, acknowledging, checking and progressing them promptly.
2. Check that referral information is complete, accurate and within the service criteria; identify missing information and obtain clarification from referrers where required.
3. Create and maintain accurate client and case records on Casebook and any other monitoring system used for the service, in line with agreed procedures.
4. Allocate cases to the appropriate Adviser, taking account of urgency, client need, adviser capacity, specialist requirements and service priorities.
5. Track the requirement for clients to receive initial contact within three working days, highlighting referrals approaching deadline and escalating overdue, urgent or unallocated cases to the Team Leader.
6. Record and monitor engagement attempts, including unsuccessful contact, and apply the agreed no-response and closure process consistently.
7. Identify and manage workflow exceptions, duplicated referrals, out-of-scope referrals, safeguarding concerns and other issues, escalating appropriately and maintaining a clear audit trail.
8. Support effective warm referrals and transfers between Coventry Citizen Advice and external partner organisations.

9. Maintain referral logs, allocation records, outstanding-action lists and other administrative controls needed to support timely case progression.
10. Work closely with the Team Leader to monitor referral flow, adviser workloads, backlogs and emerging operational risks, providing timely and accurate information for daily decision-making.

Performance Monitoring and Reporting

1. Maintain accurate performance data for the service, including referral volumes, allocation and response times, engagement, intervention type, client outcomes, financial gains, onward referrals, follow-up and case status.
2. Reconcile information held on Casebook with other system and internal monitoring records, investigating and correcting discrepancies in consultation with relevant colleagues.
3. Prepare regular performance summaries, dashboards and monthly KPI returns for review by the Team Leader and Project Manager, ensuring that information is complete, accurate and submitted on time.
4. Monitor progress against contractual targets, including the two activity streams and agreed service standards, and promptly flag gaps, trends or risks that may affect delivery.
5. Coordinate six- and 12-month follow-up activity, generate follow-up lists, track completion and outcomes, and ensure evidence is recorded consistently.
6. Coordinate referral feedback to partners in line with information-sharing arrangements, consent, confidentiality and agreed reporting requirements.
7. Support the collection and organisation of evidence for contract monitoring, audits, quality reviews, client feedback and service evaluation.
8. Produce accurate information to support service improvement, identifying patterns such as referral quality issues, non-engagement, delays, repeat referrals and unmet need.

Systems, Information Governance and Quality

1. Maintain clear, accurate and timely records for continuity of service, information retrieval, statistical monitoring, reporting and audit purposes.
2. Handle personal and sensitive information securely and comply with UK GDPR, confidentiality, consent, data protection, information-sharing and records-retention requirements.
3. Ensure administrative work follows Citizens Advice policies, quality standards, systems, processes and procedures, and any contractual requirements.
4. Support consistent use of referral categories, outcome codes, evidence standards and data-quality checks across the team.
5. Assist colleagues to resolve routine system and recording queries and raise recurring or significant issues with the Team Leader or Project Manager.
6. Be alert to safeguarding concerns and immediately follow organisational safeguarding and escalation procedures.

Partnership and Team Working

1. Maintain professional and constructive working relationships referral teams, internal services and community partners.
2. Respond to routine referral and progress enquiries promptly and professionally, sharing information only where authorised and appropriate.
3. Participate in team meetings, workflow reviews, supervision and contract-monitoring activity, providing clear updates on referral and performance matters.
4. Contribute to a collaborative, person-centred service and support colleagues during periods of high demand, absence or service change.
5. Ensure that communication with residents and partners is accessible, respectful and consistent with Citizens Advice equality, diversity and inclusion commitments.

Research and Campaigns

1. Identify recurring referral, access or service-delivery issues that may indicate wider policy or systemic problems.
2. Record and share relevant evidence in line with Citizens Advice research and campaigns procedures.

Professional Development

1. Complete the structured CRF induction, including Casebook recording, safeguarding, equality and accessibility, GDPR, confidentiality and consent, referral and escalation pathways, outcome evidence and KPI requirements.
2. Keep knowledge of relevant systems, policies and procedures up to date and undertake training considered essential for the role, including annual GDPR training.
3. Attend relevant internal and external meetings, learning sessions and reviews as agreed with the line manager.

Other Duties and Responsibilities

1. Create a positive working environment in which equality and diversity are well managed and dignity at work is upheld.
2. Prepare for and attend supervision, team meetings, staff meetings and other organisational meetings as appropriate.
3. Maintain effective administrative systems and records, work cooperatively with colleagues, encourage teamwork and support clear lines of communication.
4. Demonstrate commitment to the aims, principles and policies of Citizens Advice.
5. Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
6. Carry out any other tasks commensurate with the role, as directed by a senior manager, to support effective delivery and development of the service.

Person Specification

Criteria Essential

1. Experience of providing effective administrative support in a busy service, project or client-facing environment.
2. Ability to manage a high-volume workflow, organise competing priorities and meet fixed deadlines with limited supervision.
3. Strong attention to detail and the ability to enter, check, reconcile and maintain accurate data across more than one system.
4. Ability to monitor performance against agreed targets, analyse routine statistics and present clear, accurate information for managers and funders.
5. Confident use of IT systems and packages, including case-management or database systems, Microsoft Excel, Word, Outlook and online platforms.
6. Ability to identify exceptions, delays and risks, take appropriate action and escalate concerns promptly.
7. Ability to communicate clearly, professionally and sensitively, both verbally and in writing, with residents, colleagues, and partner organisations.
8. Understanding of confidentiality, UK GDPR, consent and secure handling of sensitive personal information.
9. Ability to work on own initiative while contributing positively to a collaborative team.
10. An up-to-date understanding of equality, diversity and inclusion and its application to accessible service delivery.
11. A commitment to continuous professional development and willingness to learn new systems, processes and contractual requirements.
12. A commitment to work within the aims, principles and policies of Citizens Advice.
13. Flexibility to meet the changing needs and priorities of the service.

Desirable

14. Experience of referral coordination, case allocation, contract administration or performance reporting.
15. Experience of working with Citizens Advice, a local authority, an advice service, or the voluntary and community sector.
16. Experience of Casebook or another client case-management system.
17. Experience of preparing KPI returns, dashboards or reports for commissioned services.
18. Awareness of the issues affecting people experiencing financial hardship, debt, vulnerability or crisis.