

Recruitment Pack

Team Leader

(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 Team Leader

Job Description & Person Specification

Role: Team Leader

Salary: £32 723.00 - £34 680.00 pro rata

Hours: 0.59 FTE (21 h per week)

Contract: Permanent (Subject to funding)

Reports To: Project Manager

Employed by: Coventry Citizens Advice

Location: Coventry Citizens Advice Offices with remote working as required

Purpose of the Role

The Team Leader will provide day-to-day operational leadership for our CORE Project Coventry, ensuring that referrals move through the service promptly, staff are well supported and residents receive consistent, person-centred help. The postholder will manage workflow, caseloads, performance and case-recording standards, working closely with the Referral and Performance Administrator, Project Manager and Advisors.

Key Responsibilities

1. Oversee the daily referral flow, case allocation and progression of work across Financial Resilience Advisers and Money Advisers.
2. Monitor the three-working-day initial contact standard, unallocated referrals, unsuccessful engagement and workflow exceptions, taking early action where deadlines or service standards are at risk.
3. Balance adviser workloads and caseloads according to urgency, complexity, staff capacity and the two contractual activity streams.
4. Ensure residents receive appropriate, proportionate support and that cases are progressed, followed up and closed in line with agreed procedures.
5. Manage day-to-day service pressures, staff absence and competing priorities, escalating significant capacity, delivery or safeguarding risks to the Project Manager.
6. Maintain clear operational procedures and support consistent practice across office-based, telephone, remote and outreach delivery.
7. Work closely with the Referral and Performance Administrator so that approaching deadlines, backlogs, recording gaps and performance concerns are identified and resolved promptly.
8. Support effective warm referrals and coordinated working with other Citizens Advice teams and community partners.
9. Staff Management and Development

10. Provide regular supervision, one-to-ones, case discussions and day-to-day support to allocated staff, setting clear expectations and addressing concerns fairly and promptly.
11. Support induction, training and continuing professional development, ensuring staff understand CRF outcomes, referral criteria, Casebook recording, safeguarding, equality, information governance and KPI requirements.
12. Monitor individual performance, case progression and workload, recognize good practice and agree improvement actions where standards are not being met.
13. Promote a supportive, accountable and inclusive team culture in which staff communicate openly, learn from feedback and remain focused on client outcomes.
14. Contribute to recruitment, probation reviews, attendance management and other people-management processes as required, following organisational policies.

Quality and Casework Oversight

1. Monitor service quality in collaboration with the Quality Lead, accuracy and timeliness of case recording, action plans, outcome evidence and case closure, completing or coordinating proportionate file checks.
2. Ensure work follows Citizens Advice quality standards, contractual requirements, safeguarding procedures, UK GDPR, confidentiality, consent and information-sharing arrangements.
3. Escalate serious quality, conduct, safeguarding or compliance concerns through the appropriate organisational route and maintain a clear record of actions taken.
4. Use learning from case reviews, complaints, client feedback and operational issues to improve procedures, staff practice and the resident journey.
5. Performance and Service Improvement
6. Review referral volumes, response times, engagement, caseloads, intervention types, outcomes, financial gains and follow-up activity against agreed targets.
7. Work with the Referral and Performance Administrator to validate KPI information, resolve data discrepancies and prepare accurate updates for the Project Manager and funder monitoring arrangements.
8. Identify trends, delivery gaps and emerging risks, agree corrective action and monitor whether improvements are sustained.
9. Support six- and 12-month follow-up arrangements and ensure learning about sustained outcomes, repeat crisis and unmet need informs service development.
10. Contribute operational evidence and recommendations to service reviews, audits, evaluation, research and campaigns activity.

Partnership and Communication

1. Maintain constructive working relationships with referral teams, internal services and external partners.
2. Provide clear operational updates, respond to escalated referral queries and support consistent feedback to referrers within consent and information-sharing requirements.
3. Attend relevant internal, partnership and contract meetings on behalf of the service, as agreed with the Project Manager.
4. Ensure communication with residents, staff and partners is professional, accessible and consistent with Citizens Advice equality, diversity and inclusion commitments.
5. Other Duties and Responsibilities
6. Keep knowledge of relevant policies, systems and procedures up to date and complete training required for the role.
7. Prepare for and participate in supervision, management meetings and organisational learning activities, demonstrating commitment to the aims, principles and policies of Citizens Advice.
8. Abide by health and safety requirements and share responsibility for the safety of colleagues and service users.
9. Carry out other tasks commensurate with the role, as directed by a senior manager, to support effective service delivery and development.

Person Specification

Criteria	Essential
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| 1. Experience of supervising, coordinating or leading staff in a busy advice, customer-service, public-service or voluntary-sector environment. | |
| 2. Ability to manage referral flow, workloads and competing priorities while maintaining deadlines and service standards. | |
| 3. Ability to provide constructive supervision, feedback and support, including addressing performance concerns sensitively and confidently. | |
| 4. Experience of monitoring casework, records or service quality and using findings to improve practice. | |
| 5. Ability to understand performance information, identify risks and take practical corrective action. | |
| 6. Strong organisational, decision-making and problem-solving skills, with the ability to remain calm under pressure. | |
| 7. Clear and professional verbal and written communication skills, including the ability to work effectively with partners and managers. | |
| 8. Confident use of case-management systems, databases and Microsoft Office applications. | |
| 9. Understanding of safeguarding, confidentiality, UK GDPR, equality and accessible service delivery. | |

10. Commitment to person-centred services, collaborative working, continuous improvement and the aims and principles of Citizens Advice.

Desirable

11. Experience of working within Citizens Advice, an advice service, a local authority or a commissioned service.
12. Knowledge of financial resilience, welfare benefits, debt or the issues affecting households experiencing financial hardship.
13. Experience of Casebook, KPI reporting, contract monitoring or formal case-quality checks.
14. Experience of supporting a multidisciplinary team that includes regulated or specialist advisers.