

# Recruitment Pack

## Macmillan Specialist Benefits Adviser

Date: June 2024



## Introduction from Jon Perry, Chief Executive

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 around 10,000 people per year with over 50,000 issues. We identify and help secure nearly £13 million in 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 world has changed considerably recently and so have we. We have invested in our IT infrastructure with Office365 so our workforce is agile, and clients can still access our services when they need us the most. We have revised our services to ensure that we are flexible and can meet the changing demands for our services.

We are facing an unprecedented cost of living crisis. Most people's incomes haven't grown for years. They are being squeezed by high inflation, rising energy costs, and increasing mortgage and rental rises. Many people are struggling to pay back debts and are dealing with employment, family, consumer, housing, and other issues.

We are always looking for ways to improve our services and work more closely with partners. This means new opportunities to experiment locally through co-design and partnerships across a range of different sectors. We are looking for people who can think about how things could be done differently to be more effective and efficient and bring their ideas to the table for discussions with their peers.

Working for Coventry Citizens Advice is extremely rewarding due to the positive impact and high-quality service we provide for our clients. Our clients are fundamental in what we do, and our Values are key to how we work across the charity. Prior to applying, please ensure that you understand and agree with our Values, which can be found below.

Coventry Citizens Advice offers an array of different services which provide opportunities to learn new skills and understanding about wider services. More information on our different service areas can be found on our website [www.coventrycitizensadvice.org.uk/projects](http://www.coventrycitizensadvice.org.uk/projects).

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

### Our Values:

Our core values as an organisation are: Professional, Accessible, Innovative and Empowering. 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 are:**

### **Respectful**

- We respect all people we work with including clients, colleagues and those from funders and external agencies, treating them equally, and without judgment.
- We respect external agencies, funders, colleagues when negotiating on behalf of clients to ensure the professional reputation of the organisation.
- We remain impartial in the way we deliver advice, respecting and appreciating the diverse nature and culture of our community.
- We talk about our work and our clients in a way that upholds and reinforces confidentiality and privacy.
- We respect colleagues, share best practice with each other, work as a team, acknowledging our different strengths and helping each other to deliver quality advice and guidance.

### **Accountable**

- We are accountable for our own actions and decisions in line with National Citizens Advice guidance and standards required under our AQS accreditation and FCA registration.
- Our managers are accountable to motivate, lead and manage their teams within set guidelines.
- We are accountable to our funders, to deliver our service to the standards, outputs, outcomes, and timescales we agreed.
- We are accountable to our clients, to ensure that the advice we give is correct, current, and does not disadvantage them; or lead to detriment.
- We are personally accountable to act in a way that upholds the reputation of CCA, by way of adhering to our HR Policies and Procedures.

### **Ethical and Lawful**

- We are ethical and lawful because the advice/guidance we deliver is researched using recognised and reputable sources such as CPAG, Advisernet. Our advice adheres to the Principles, Rules and Guidance detailed in the FCA Handbook.
- We are bound by and comply with the rules of GDPR.

- We adhere to the National principles of Confidentiality, Independence Impartiality and the service being free of charge.
- We work with clients, advising them about what they are entitled to in terms of benefits and other financial and practical support, seeking to maximise their income or to find a way forward within lawful boundaries.
- We identify that advice and assistance complies with statute, regulation, common law and guidance in respect of such matter as equality and diversity, data protection and consent, health and safety and client care.

## Effective at Building Resilience

- We build resilience by educating and teaching our clients how to effectively respond to issues and to resolve them before crisis point.
- If a client is at crisis point, we not only advise them about the best routes to resolve the issues, but also support strategies to avoid repeating the situation.
- We build Resilience amongst staff and volunteers by providing ongoing training and by sharing best practice across the organisation to build a flexible and resourceful team.
- We assess the skills, knowledge and aptitudes possessed by individuals within the organisation to ensure that we can provide advice and assistance without errors and any financial loss or damage to our reputation.

## Empowering

- We follow the National Citizens Advice framework which emphasises putting clients in control, using tools, guidance and directed self-help wherever we can. Where self-help isn't appropriate, we advise clients of the available options and consequences so they can choose the right option for their needs.
- We seek to empower colleagues to be both innovative and creative, and to find solutions themselves before seeking support to build their confidence in their work.
- We provide constructive and fair feedback with a purpose to empower colleagues and strengthen the quality standards and effectiveness across the organisation.

## Work Collaboratively

- We work collaboratively to ensure the most appropriate outcome for clients. We do this by sharing best practice, experience, and knowledge, referring internally between projects, by promoting the work of other projects, providing training and development opportunities for staff and volunteers and embedding a broad teamwork approach.
- We recognise that different individuals, agencies, teams, and communities comprise a wealth of skills, knowledge and expertise.
- We recognise the power of partnership working and seek to signpost clients to other agencies who are better placed to meet needs that are outside our scope.

## Communicate Effectively

- We value our team and communicate this effectively to assure everyone they are valued as part of our CCA team.
- We listen to one another, and we contribute to discussions and problem solving.
- We take responsibility for the messages we deliver and how they are communicated. We are engaged listeners and we communicate openly and honestly.
- We use language that is plain and designed to be understood by everyone.
- We use languages and methods of communication other than spoken or written English where appropriate, including Makaton and BSL.
- We make effective use of translation and interpretation services to benefit clients and communities.

## Supportive

- We are a team of individuals working towards the same goal. This promotes positive mental health and wellbeing.
- We help to facilitate and provide encouragement to support clients and colleagues achieve their goals. We give thought to our actions and communication to ensure that what we say and do supports the aims of our clients and our colleagues.
- We praise success.
- We don't discriminate or judge.

## About Coventry Citizens Advice

Coventry Citizens Advice is a progressive organisation that has been able to continually innovate and develop new services over the course of the 80 plus years it has been running. 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 areas of 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, alongside the Client Services Director, oversees the day-to-day running of local Citizens Advice office services.

The organisation has around 45 paid members of staff and is proud to have more than 40 volunteers working for it in some capacity throughout the course of the week.

Our busy core services operate daily, and clients can contact us for advice online and on the telephone. We are offering face to face appointments for those clients whose needs cannot be met digitally or by telephone.

The organisation service has embarked on exciting partnerships with a range of private sector organisations such as National Grid to offer energy advice and support, with Barclays Bank to increase financial capability, and with Coventry Building Society to help with digital inclusion.

We continue to work with existing and new partners across all three sectors to deliver quality services to the most vulnerable in our society and to help people out of crisis.

## 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 Occupational Health, and Employee Assistance Programme
- Cycle to Work-Scheme
- Free eye tests and contribution towards lenses/spectacles for Computer users if appropriate
- Discounts on leisure facilities and a range of discounted offers

## Conditions regarding offers of employment

If you are successful and are offered a post, you should be aware that 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, 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.

## How to Apply

### Application Form

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

Do 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.

## **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 of 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. If you would like to see our Equality and Diversity policy, please let us know and we will provide you with a copy.

## Instructions

The closing date for applications is **22 July 2024 at 9am**.

Interviews to be held **week commencing 05 August 2024**  
(in the event that you are shortlisted, you will need to be available in this week).

Where we ask you to give a presentation on the day, we will provide you with the topic and indicate the time you have available, as well as making sure you have the facilities available to make your presentation.

Please email your application to: [recruitment@coventrycab.org.uk](mailto:recruitment@coventrycab.org.uk).

If you are unable to make an electronic application, you may submit your application on paper and post to:

c/o HR, Coventry Citizens Advice, Kirby House Little Park Street Coventry CV1 2JZ.

**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 a pre-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 manual 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

# Macmillan Specialist Benefits Adviser

Salary:	£28,000–£31,737 per annum pro rata (based on experience)
Hours:	14.5 hours per week
Responsible to:	Macmillan Project Manager and Macmillan Team Leader
Based at:	Coventry Citizens Advice Head Office Hybrid working by arrangement

### The Service

The service is provided for clients across Coventry and Warwickshire mainly by telephone and home-based, if preferred it can be delivered from one of our premises; hybrid working is encouraged, (Face-to-face advice has previously been provided in different settings and there may be a requirement at some time for this to resume).

### Purpose of the Job

To provide specialist advice and casework up to representational level regarding state welfare benefits, Tax Credits, Local Authority entitlements, and charitable grants to mitigate the financial impact of a cancer diagnosis.

## **Key Responsibilities**

### **1. For clients affected by cancer:**

- Deliver the service by a range of methods, incl. telephone/digital channels with the possibility of its augmentation by F2F appointments, outreach work and home visits.
- Advise and assist identifying potential financial gains, performing calculations, completing forms, negotiating with third parties, drafting or writing letters.
- Provide a full casework service in welfare benefits, e.g., optimization of Disability Benefits, Elements and Additions.
- Assist clients with other related problems including employment, housing and debt related issues where they are an integral part of the case, referring or signposting to internal or external sources of advice, as appropriate.
- With training and support, prepare and present cases to statutory bodies, tribunals and courts, referring to specialist representation, if required. (This is an area we aspire to develop further.)
- Ensure appropriate referrals to MacMillan Support Services.
- Ensure that all advice and casework conform to Citizens Advice membership and MacMillan requirements, and the Advice Quality Standard.
- Maintain and utilize detailed case records using the accepted case management system
- Ensure the delivery of individual service targets and support the delivery of the overall targets for the CCA MacMillan Project.
- Contribute to the mutual support provided by the MacMillan Benefits Specialists to one another.

### **2. Service Development**

- Attend and participate in regular team meetings to enhance the performance of the MacMillan Project and CCA generally.
- Participate in the MacMillan Peer Review, (Monthly IFR), Scheme.
- Attend and participate in any relevant forums as detailed by Macmillan Cancer Support.
- Provide presentations and talks to promote and familiarize others with the MacMillan Project.
- Develop as appropriate relationships with other professionals in cancer treatment and support.
- Provide qualitative and quantitative feedback to allow the monitoring, evaluation and promotion of the MacMillan Project.

### **3. Social Policy:**

- Keep up to date with current research and campaigns issues.
- Participate in research and campaigns activity by providing information about clients' circumstances and actions on behalf of clients.

#### 4. Learning and development:

- Provide mentoring and support to staff and volunteers delivering welfare benefits advice.
- Keep up to date with legislation, case law, policies and procedures and undertake training appropriate to the role.
- Identify own learning and development needs and undertake training appropriate to the role and training required by the funder.
- Prepare, attend, and participate in regular one-to-one meetings, (Supervision), and Annual Appraisals.

This job description is an outline only and the post holder will be expected to carry out other duties commensurate with the role.

### Person Specifications

Criteria	Essential
1.	Recent experience of providing outcomes driven welfare benefits casework to the Advice Quality Standard or the ability and willingness to undergo intensive training to provide this.
2.	A good understanding of the skills and techniques used in interviewing clients through a range of channels including telephone, digital and face-to-face.
3.	The emotional resilience necessary to work empathetically and professionally to support people affected by cancer.
4.	The ability to monitor and maintain own standards, prioritize work and meet deadlines and targets.
5.	An organized approach to work and the ability and willingness to follow set procedures concerning casework and file management.
6.	The ability to analyse and interpret complex information and to communicate effectively in writing with particular emphasis on negotiation and representation skills and on preparing letters and submissions.
7.	Good oral communication skills and the ability to communicate well with a wide cross section of people including members of the public, statutory and non-statutory agencies.
8.	A flexible approach and the ability to work as part of a small team.
9.	The Citizens Advice Certificate in Generalist Advice or an ability and willingness to achieve this qualification.
10.	An understanding of and commitment to the aims, principles and policies of the Citizens Advice service including a strong commitment to equality and diversity.
11.	A commitment to continuing professional development including a willingness to develop knowledge and skills.
12.	An ability and willingness to travel to provide advice, attend training and meetings when physical attendance is necessary.