

JOB PROFILE: WELFARE APPLICATIONS COORDINATOR

Role:	Welfare Applications Coordinator	Date profile last reviewed:	January 2025
Name:		Reports to:	Beneficiary Relationship Manager (BRM)

MAIN SUMMARY OF ROLE:

To provide support to the Welfare Directorate by providing advice and guidance to caseworkers and beneficiaries when completing and submitting applications to the Fund. This includes the processing of applications received and co-ordinating and optimising the beneficiary journey to successful outcomes.

KEY ACCOUNTABILITIES/RESPONSIBILITIES:

- Be confident in adding applications, correspondence and documentation to the Funds CARE database, including the transfer of case documentation from Mosaic, Lightning Reach and email applications.
- Input application data into CARE, creating the Contact and Application records, accurately transferring information from the application, ensuring that Applications reflect the main type of assistance required (Individual Grants, Housing or Care and Respite).
- Within CARE, establish, manage, and optimise beneficiary relationships from one Contact to another, and between a Contact, Application and Award as appropriate.
- Confirm basic eligibility criteria for applications and refer for review to the Beneficiary Relationship Manager (BRM), if required.
- Allocate cases to the appropriate Welfare Executive or Team, monitoring the overall caseload.
- Allocate communications on Mosaic database and Lightning Reach to the relevant Welfare Executive or team.
- Managing the Lightning Reach application portal, declining inappropriate applications and liaising with BRM, Execs and caseworkers to make appropriate onward referrals
- Advising and guiding caseworkers and beneficiaries on possible Fund assistance and the best way to make an application (direct or via a caseworker)
- Liaising with BRM and other Fund staff to progress applications for assistance
- Register casualty notifications onto CARE and notify other staff as necessary.
- Liaise with RAF Disclosures, RAF Cranwell to request and receive Service Verifications.
- Process awards within CARE for Minor Financial Assistance, Transition and Immediate needs Grants.

- Monitoring incoming work from all sources to ensure cases are processed in the appropriate order.
- Updating CARE as appropriate and saving case-working Organisation's Address and Bank Details.
- Willingness to work with other Welfare Application Co-ordinators to ensure that the working day and leave periods are covered.
- Provide Ad Hoc cover for the Welfare Navigator role (responding to enquiries and making caseworker referrals) as directed by the Beneficiary Relationship Manager.
- Scrutinising and paying Law Express invoices

COMPETENCIES REQUIRED FOR THE ROLE

Essential	Desirable
<ul style="list-style-type: none"> • Following Instructions and Procedures • Coping with Pressures and Setbacks • Planning and Organising • Writing and Reporting • Working with People • Adhering to Principles & Values 	<ul style="list-style-type: none"> • Relating and networking • Adapting and Responding to Change • Achieving Personal Work Goals and Objectives • Deciding and Initiating Action

QUALIFICATION(S), KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED FOR THE ROLE

Academic or Professional Qualifications (or equivalent):

<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> • A minimum of three GCSEs grades A – C, or equivalent. 	<ul style="list-style-type: none"> •

Knowledge/ Experience:

<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> • Experience in use of databases, i.e. retrieval, interpretation and actioning of data/correspondence • Previous administrative experience, including data entry, with high attention to detail 	<ul style="list-style-type: none"> • Previous experience of working within a grant giving organisation. A good understanding of the charitable sector and to where people can be signposted

Skills/Abilities:

<u>Essential</u>	<u>Desirable</u>
<ul style="list-style-type: none"> • Excellent IT Skills including all MS Office products • Ability to work to deadlines 	<ul style="list-style-type: none"> •

Other Requirements:

- Must obtain a satisfactory Enhanced Disclosure and Barring Service (DBS) certificate.
- Be based at 67 Portland Place for a minimum of three days per week.
- Travel to other Fund locations in the UK (as appropriate).

I confirm this job profile has been drawn up with my full involvement and accurately reflects the responsibilities of the role.

Postholder's Signature:

NAME:

Line Manager's Signature:

NAME:

Date: