

JOB PROFILE: WELFARE APPLICATIONS COORDINATOR

Role:	Welfare Applications Coordinator	Date profile last reviewed:	October 2026
Name:		Reports to:	Beneficiary Relationship Manager (BRM)

MAIN SUMMARY OF ROLE:

To provide support to the Operations 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 CRM, including the transfer of case documentation from Mosaic, Lightning Reach and email applications.
- Input application data into CRM, 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 Respite and Care).
- 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 referral.
- Liaising with BRM and other Fund staff to progress applications for assistance
- Liaise with RAF Disclosures, RAF Cranwell to request and receive Service Verifications.
- Process awards for Emergency Grants, Transition and Immediate needs Grants.
- Monitoring incoming work from all sources to ensure cases are processed in the appropriate order.
- Respond to beneficiary enquiries regarding ongoing applications for assistance.

COMPETENCIES

<u>Essential</u>	<u>Desirable</u>
• Following Instructions and Procedures • Coping with Pressures and Setbacks • Planning and Organising • Writing and Reporting • Working with People • Adhering to Principles & Values	• 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>
• A minimum of three GCSEs grades A – C, or equivalent.	•

Knowledge/ Experience:	
<u>Essential</u>	<u>Desirable</u>
• 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	• 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>
• Excellent IT Skills including all MS Office products • Ability to work to deadlines	•
Other Requirements:	
• Must obtain a satisfactory Basic 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).	

Signature

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