

# Funding & Benefits officer

Applicant Information Pack



## A warm welcome from SLSW

Hello,

Firstly, thank you for your interest in joining Shared Lives South West as a Funding & Benefits Officer.

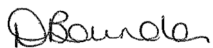
Our focus is to provide people with high-quality, person-centred support, and this happens each and every day thanks to our incredible Shared Lives Carers and our committed staff team.

Since our humble beginnings in 2004, we have achieved many great things and have grown and evolved our services over the years. In 2019, we were rated 'Outstanding' by the Care Quality Commission, and we are passionate about flying the flag for the care sector. Our staff team, Shared Lives Carers, people who use our services, and volunteers all play vital roles in making Shared Lives South West what it is today.

We recognise the benefits of a diverse team and welcome people of all ages, disabilities, gender identities, marital status, race, faith or belief, sexual orientation, and socioeconomic backgrounds.

So, if you are looking to join a team that truly puts people at the centre of everything they do, please read on or contact us today.

We look forward to hearing from you.



**Donna Bounden**  
**Funding & Benefits**  
**Team Leader**





## We're a different kind of care organisation

Shared Lives South West is a social care charity based in the Southwest that supports adults to live meaningful, connected lives within their communities. We recruit and support Shared Lives Carers who open their homes and their lives to people who need support. Shared Lives is often described as being a bit like adult fostering: a person-centred, community-based alternative to supported living or residential care.

We currently work with local authorities across Cornwall, Devon and Somerset, with 290 carers supporting over 450 people.

### **Shared Lives is about real relationships**

It is about belonging, everyday life, shared routines, shared meals, and shared moments. People live as part of a household, and it works best when there is trust, mutual respect, and long-term connection between people and the carers who host them. The people we support have their own hopes, interests and ambitions, and our role is to support them to live their fullest lives.

Our staff team recruits and supports carers, and works alongside people who use Shared Lives services. We work closely with local authorities, health partners, and communities across the Southwest to champion relational, community-based support.

### **Shared Lives South West is a stable, values-led organisation**

We are proud of our culture, our people and the way we work together. This role sits within an organisation that is continuing to strengthen how it works, how it supports people, and how it sustains the Shared Lives model in a challenging social care landscape.

## our vision, purpose, and values

Shared Lives South West is rated 'Outstanding' by the Care Quality Commission. We work across diverse communities and alongside a wide range of partners in Devon, Cornwall and Somerset.

We take pride in being an organisation that leads with clear vision and purpose, underpinned by strong values about how we work, how we lead, and how we treat one another.

**Our Vision** is to be the leading Shared Lives provider in the country.

**Our Purpose** is to make a positive impact on the lives of the people we support.

**Our Values** Sit at the heart of everything we do. They guide how we design services, how we make decisions, and how we show up for the people and communities we serve. We put CARE into everything we do.



### Community

Working together with a shared purpose and belonging to achieve common goals.



### Autonomy

Empowering people to take ownership and accountability for decision-making.



### Resilience

Building the strength and character to embrace change and challenge.



### Equity

Giving people what they need to have equal access to opportunities in life.

These values shape our priorities and our expectations of each other.

If they resonate with you, and you're looking for a role where you can genuinely live them out every day, we think you'll feel at home here.

## A culture that makes us want to come to work

Shared Lives South West has an established organisational culture shaped by our values, our connections with one another, and how we work together day to day. We are intentional about sustaining a culture that is supportive and grounded, while remaining professional, accountable and focused on providing a high-quality service.

### **We trust people to lead their own work**

One of the things that makes us genuinely different is how we are organised. We operate through self-managed teams, where people have real ownership and accountability for their work. This is one of the ways we embody our value of Autonomy.

### **We take wellbeing seriously**

We treat each other with kindness and compassion. We aim to bring our whole selves to work, recognising that people do their best work when they feel understood and supported. We seek to balance organisational needs with individual needs wherever possible.

### **We are open, transparent and honest with each other**

We share information and explain decisions. We encourage honesty, feedback and thoughtful challenge. We value joy, connection, and a working environment where people genuinely want to come to work.

We are open about who we are and how we work. The following might help you sense whether this feels like the right kind of place for you.

This role is for you if:

- You take pride in getting the detail right and care about the difference it makes to real people
- You are good at navigating complex systems and agencies without losing sight of the person behind the case
- You can manage your own priorities, take initiative and work independently
- You want to work somewhere that genuinely lives its values

This role is probably not for you if:

- You prefer a structure where decisions come solely from the top
- You find it difficult to take initiative without being directed

# Job description: Funding & Benefits officer

**Reporting to:** Funding & Benefits Team Leader

**Working Closely with:** Funding & Benefits team, Finance team, Shared Lives Coordinators, Administrators

## Purpose Statement

To provide efficient and effective funding and benefit support to Shared Lives Carers and the people supported.

## Duties include:

### Funding and Welfare Benefits

1. At the point of entry, ensure that the people supported have sufficient finances and/or benefits to fund their contribution to costs of the service.
2. Where the people supported do not manage their own finances, ensure that the correct appointee or deputy is in place.
3. Ensure that the people supported receive their maximum benefit entitlements by applying for all relevant benefits, challenging incorrect award decisions where required.
4. Conduct financial assessment for the people supported, ensuring that the relevant charging policy has been applied, challenging incorrect decisions where required.
5. Advise the Funding & Benefit Team Leader promptly of any complex benefit issues.
6. Assist Shared Lives Carers and the people supported in handling correspondence from a wide range of external agencies relating to relevant benefits, and other issues relevant to their service.
7. Maintain an advanced, practical and theoretical understanding of all relevant welfare benefits and associated legislation, undertaking relevant training as required.

### Payment Run, Money Management and Recordkeeping

8. Ensure that accurate records are kept for all benefits claimed and received through various databases, monitoring and checking any changes.

9. Calculate the appropriate payment for each period for each Shared Lives Carer providing a long-term service, ensuring that all payment amounts are fully reconciled, liaising with the Finance team as required.
10. Advise the Funding & Benefit Team Leader promptly of any potential bad debts.
11. Check for authorisation any invoices or deductions from personal allowances for the people supported.
12. To prevent financial abuse of the people supported, audit bank accounts, savings and spending activity, and support Shared Lives Coordinators in completing finance checks.
13. Support the Finance team with money management queries.
14. Send appropriate letters and paperwork to all parties involved, as and when required.

## **Contact and Communication**

15. Act as the main point of contact for all enquiries on benefits and funding issues for Shared Lives Carers, staff and those using our long-term services.
16. Regularly advise and support Shared Lives Carers, external appointees and those using our services on funding and benefit issues.
17. Work closely with the Shared Lives Coordinators, communicating effectively with regard to individual circumstances both verbally and in writing.
18. Make occasional visits to those using our services, Shared Lives Carers and external appointees about funding and benefits issues as needed.
19. Take part in delivering all aspects of Funding and Benefits training for Shared Lives Carers and staff.

## **Other duties**

20. Support the Funding and Benefits team with project work, the implementation of strategic initiatives and in updating policies and procedures.
21. Keep up to date with relevant policy relevant to Shared Lives and your role.
22. Maintain confidentiality at all times, in line with the confidentiality policy.
23. Any other duties as directed by the line manager that may be appropriate to the post.



## Person Specification

### Fundamental Requirements

- GCSE Grade C/Level 4 or above in Maths and English, or equivalent.
- Relevant training in welfare benefits, money advice or financial administration.
- Full driving licence and ability to travel according to the needs of the role.
- Right to work in the UK.
- Appointment is subject to a satisfactory Enhanced DBS check.

### Values and Behaviours

We are looking for someone who lives our values of Community, Autonomy, Resilience and Equity, by:

- Building positive, trusting working relationships with others, creating a sense of unity and belonging.
- Taking ownership and using initiative to improve how we work.
- Staying calm and supportive when responding to challenges and changing priorities.
- Valuing diversity and acting with integrity, fairness and respect.
- Bringing a positive, professional approach to supporting service delivery.
- Commitment to professional development and ongoing learning.

### Essential Knowledge and Experience

- At least one year's experience of welfare benefits working within welfare benefits, financial support, money advice or a related field.
- Experience of closely working effectively with benefits agencies and local authorities and other external organisations.
- Experience of supporting applications for welfare benefits, particularly for adults with support needs.
- Experience of maintaining accurate records and managing confidential information appropriately.
- Experience of working collaboratively with internal and external stakeholders to ensure a seamless and high-quality service.
- Good understanding of welfare benefits systems and processes, including benefit applications, reviews and changes in circumstances.
- Experience of working within a health or social care environment.

## **Desirable Knowledge and Experience**

- Understanding of local authorities charging for care and support policies.
- Experience supporting people with budgeting, financial administration or financial wellbeing.
- Knowledge of safeguarding adults and Mental Capacity Act.
- Understanding of appointeeship and Court of Protection processes.

## **Essential Skills and Abilities**

- Strong organisational skills, including planning, prioritising and supporting to manage the team's workload.
- Ability to work flexibly, both independently and as part of a team.
- Strong communication skills, both written and verbal, able to explain complex or sensitive information clearly and appropriately, adapting style to suit different situations.
- Confident using Microsoft Office including Excel and other digital systems.
- Ability to maintain professional boundaries, confidentiality and accurate records.
- Proactive, dependable and solution focused.
- Able to work accurately and methodically, with good attention to detail.

## **Desirable Skills and Abilities**

- Knowledge of Sage Accounting.

# Terms and Conditions

<b>Starting Salary:</b>	28,858.74 FTE
<b>Hours:</b>	30 hours with flexibility to extend to 37.5
<b>Days worked:</b>	Must include Friday
<b>Contract:</b>	Permanent
<b>Location:</b>	Zealley House, Kingsteignton, Devon

## **Annual leave:**

25 days per year plus bank holidays, increasing to 27 days after two years' service.

## **Pay Progression:**

Transparent pay framework with defined grades, ranges and annual pay review for progression.

## **Pension:**

Scottish Widows contributory scheme with up to 5% employer match and salary sacrifice option.

## **Death in Service:**

Group life assurance of four times annual salary.

## **Sickness and Wellbeing:**

Generous sick pay and proactive support for medical appointments.

## Additional Benefits

Being a staff member with Shared Lives South West not only has the satisfaction of knowing you're working with an 'Outstanding' organisation as rated by CQC, with competitive rates of pay, annual leave entitlement and absence pay but there are numerous smaller benefits for staff that can make a difference to you as an employee.

### Additional day off to mark your birthday

We realise people like to celebrate their birthday, so can take a day off and enjoy it.

### Wellbeing Hour

All employees are entitled to take one hour per week to benefit their well-being. Shared Lives South West pro-actively support medical appointments and generous sick leave.

### Paid dependant and Carer leave

It's available to help employees manage caring responsibilities and unexpected situations involving loved ones. This support can help staff balance work and personal commitments during difficult or demanding times.

### Volunteer days (two per year)

We encourage the team to help other causes and organisations by volunteering.

### 24/7 access to GP telephone service

Also available are bespoke health and fitness plans and expert advice on both mental and physical health.

### Accident and Injury Insurance

All employees are covered by an accident and injury group insurance policy. This applies whether the accident or injury occurs when at work or outside of work, with some exceptions.

It is also worth while familiarising yourself with the non-salary benefits policy that covers more information on some of these benefits in more detail.

### Mindful Employer Support

SLSW has signed the Mindful Employer Charter as a shared commitment to protect, promote and enhance the mental wellbeing of staff. The employee advice line offers you a place to turn for support any time of day or night. Support is available for whatever issues you might be facing, including work-related stress, depression, marriage and relationship issues, legal concerns, coping with change, parenting issues, financial problems and much more.

### Option to buy additional annual leave

Employees may have the option to buy up to one extra week of annual leave.

## Cycle to Work Scheme

Shared Lives South West can support an employee to acquire a new bicycle and related safety equipment, under the 'cycle to work' scheme, primarily but not exclusively intended for use to commute to work or on work related journeys.

## Blue Light Card Eligibility

Shared Lives South West is a social care charity and as such, staff are eligible to apply for a Blue Light Card:

“Blue Light are the discount service for the emergency services, NHS, social care sector and armed forces, providing members with thousands of amazing discounts online and on the high street.

For just £4.99, members of the Blue Light community can register for two-years access to more than 15,000 discounts from large national retailers to local businesses across categories such as holidays, cars, days out, fashion, gifts, insurance, phones, and many more.”

\* Please note that these benefits are subject to change and were correct at the time of printing.



## Recruitment Timetable

Please make a note of the dates below and inform us as soon as possible if any listed will present significant issues for you.

Whilst we cannot promise any flexibility, there is more chance of this being offered if a good degree of notice is given.

June 29, 2026 at 9am	Application deadline
July 6, 2026	Interview date

## How to apply

If you would like an informal chat about the role please contact Donna Bounden, Funding & Benefits Team Leader, on 01626 360170.

If you have any queries about the recruitment process, please email: [people@sharedlivessw.org.uk](mailto:people@sharedlivessw.org.uk).

Please complete the application form (CV's alone are not accepted) and email it to the email address above. Alternatively, return it via post (details are on application form)

All candidates will be notified if selected for interview or not.

## Further information

For further information on SLSW, visit our [website](#).

To read the latest SLSW Annual Report, [click here](#).

For information about how we use and store your data under the General Data Protection Regulations (GDPR) 2018, please refer to our privacy policy.

# Shared Lives South West – Application Form

## Section 1



### Introduction

Thank you for taking the time to complete this application form. Your submission is helping us uphold safer recruitment principles and ensure our process is fair, consistent, inclusive and focused on finding the right person for the role.

This form is used for short-listing, so please complete all sections in full. It's your opportunity to demonstrate why Shared Lives South West is the right place for you, and how your experience, knowledge, skills and personal qualities meet the requirements of the Job Description and Person Specification.

Post Applied For	
Where did you find out about this vacancy?	

## Section 2



### Personal Details *(Removed for short-listing purposes)*

Full name	
Address	
Telephone	
Email	



### Reasonable Adjustments for Interview

Shared Lives South West is committed to ensuring our recruitment process is inclusive and accessible to everyone.

Please let us know if you require any adjustments, support, or facilities to help you take part in the interview process.  Yes  No

If Yes, please provide brief details:

If you are invited to interview, we will contact you to confirm and discuss these arrangements.

## Section 3



### Fundamental Requirements and Availability

I have the right to work in the UK.  Yes  No

I hold a full, valid UK driving licence (or equivalent) and have access to a car for work purposes.  Yes  No

I understand that this post is subject to an Enhanced DBS check, including the relevant Barred List(s), and I am willing to undergo this check.  Yes  No

Earliest possible start date (considering any notice period)	
Dates you are unavailable for interview	

## Section 4



### Education and Qualifications

Please list your education, qualifications and relevant training that support your application.

Include overview of relevant professional certificates, vocational awards, or any ongoing study. Continue on a separate sheet if needed.

Qualification/Course
Institution/Provider
Date Completed
Level/Grade

Qualification/Course
Institution/Provider
Date Completed
Level/Grade

Qualification/Course
Institution/Provider
Date Completed
Level/Grade

Qualification/Course
Institution/Provider
Date Completed
Level/Grade

Qualification/Course
Institution/Provider
Date Completed
Level/Grade

Qualification/Course
Institution/Provider
Date Completed
Level/Grade

## Section 5



### Employment History

Please provide a full employment history, starting with your most recent role. Include all employment and volunteering for the past ten years (or since leaving full-time education if less). Continue on a separate sheet if needed

Dates (From-To)	
Employer/Organisation	
Job Title/Role	
Summary of Main Duties/Responsibilities	
Reason for leaving	

Dates (From-To)	
Employer/Organisation	
Job Title/Role	
Summary of Main Duties/Responsibilities	
Reason for leaving	

Dates (From-To)	
Employer/Organisation	
Job Title/Role	
Summary of Main Duties/Responsibilities	
Reason for leaving	

Dates (From-To)	
Employer/Organisation	
Job Title/Role	
Summary of Main Duties/Responsibilities	
Reason for leaving	

Dates (From-To)	
Employer/Organisation	
Job Title/Role	
Summary of Main Duties/Responsibilities	
Reason for leaving	

Please explain any gaps in employment below:

## Section 6



### More About You

Help us understand more about you and your approach to work.

What attracted you to apply for this role with Shared Lives South West, and why do you think it's the right place for you?

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Tell us about your experience supporting people with benefits. How do you support someone in a way that respects their autonomy while also ensuring their financial wellbeing and safety?

Tell us about a time when you had to manage detailed financial or administrative records. How did you ensure accuracy, and what checks did you put in place to avoid errors?

Please provide an example of how you have contributed to improving a process, system or way of working in your role.

Is there anything else you'd like us to know about you or what you would bring to this role?

## Section 7



### References

Please provide details of two referees covering at least the last five years of your employment history. One should be your current or most recent employer, where applicable.

References must not include relatives. If you provide a personal referee, they should be able to comment on your skills, abilities, and suitability for this role.

References will normally be taken up after short-listing and before appointment, unless there is a specific safeguarding reason to do so earlier.

Additional references may be sought from previous employers where this is necessary to verify employment history or suitability for the role.

Current Employer/Most Recent Employer *	
Name	
Email	
Telephone number	
Relationship	
How long have they known you?	
Can we contact this referee before interview	Yes      No

\* (Or alternative referee where not available).

Other	
Name	
Email	
Telephone number	
Relationship	
How long have they known you?	
Can we contact this referee before interview	Yes      No

## Section 8



### Declaration

I declare that the information provided in this application is, to the best of my knowledge, complete and correct. I understand that if, after appointment, any information is found to be inaccurate or misleading, this may lead to dismissal without notice. I confirm that I have personally completed this application form and that I have read and understood the enclosed privacy statement.

Signed:

*(Type your name online as if executed on paper)*

Date:

## Section 9



### Next steps

Please return your completed form.

#### **By email:**

people@sharedlivessw.org.uk

#### **By post:**

People Assistant  
Shared Lives South West  
Suite 3 Zealley House  
Greenhill Way  
Kingsteignton  
TQ12 3SB