



ROLE & RESPONSIBILITIES: GENERALISTIC ADVISER

1) Advice Work

- 1.1 Interview clients face-to-face, on the telephone and via web chat and email, using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and explore options.
- 1.2 Use Citizens Advice and other appropriate resources to find, interpret and communicate all relevant information to clients in a manner they can understand.
- 1.3 Provide appropriate advice, researching and exploring options and implications, to help clients set priorities and make informed decisions.
- 1.4 Complete benefit checks when appropriate and support clients to use IT to make online applications.
- 1.5 Act for the client using appropriate communication skills and channels. Undertake casework on clients' behalf, write letters, negotiate with third parties as required.
- 1.6 Accept referrals, also refer internally or to other agencies as appropriate.
- 1.7 Maintain clear, timely and accurate case records that meet the quality standards required for continuity of casework, information retrieval, statistical monitoring, accountability and report preparation.
- 1.8 Seek support as necessary to ensure a high quality of advice, good practice and that the degree of casework taken on is appropriate.
- 1.9 Co-operate with the arrangements of the Advice Session Supervisors and Project Supervisor(s) in providing cover and delivering the advice services required.
- 1.10 Work in a variety of settings including community outreach, Jobcentres and local authority offices as required and when doing so, promote the service.

- 1.11 Liaise with statutory and voluntary organisations such as the Department of Work and Pensions, HMRC, Social Services and community organisations as appropriate and stay up to date with changes in local policies and services.
- 1.12 Ensure that all work meets the quality standards and the requirements of the funders and maintain the additional records needed by projects for reports to funders.

2) Training and Professional Development

- 2.1 Complete the training required to comply with quality assurance processes in a timely manner and ensure GDPR-compliant training is completed on an annual basis.
- 2.2 Keep up to date with new and changing legislation, policies and procedures and with local and national issues relevant to the post.
- 2.2 Read Citizens Advice circulars and information items, and relevant publications.
- 2.3 Attend regular training to develop knowledge, skills and expertise and relevant internal and external meetings as agreed with the line manager
- 2.4 Participate constructively in staff meetings, team meetings and supervision sessions.
- 2.5 Undergo training in Information & Communication Technology and case management software and apply it as needed to carry out the tasks of the post.
- 2.6 Assist in the training of volunteers from the local community as and when required.

3) Administration

- 3.1 Ensure that the information sources you use are up to date.
- 3.2 Maintain statistics, records and analysis of work in accordance with CAH's systems, procedures and funding conditions.
- 3.3 Be responsible for own file management and letter writing and implement admin procedures as directed by the line manager.
- 3.4 Comply with GDPR and cyber security measures in use of telephony and IT equipment for multichannel delivery of advice services.

4) Research and Campaigns

- 4.1 Recognise the root causes of problems and contribute evidence, highlighting issues of particular concern to disadvantaged groups and to clients in general.
- 4.2 Support research and campaigns work through various channels including case studies, data collection and client consent.
- 4.3 Participate in local and regional research and campaigns initiatives developed by CAH, its projects and partner organisations.

Policies of the Citizens Advice Service:

The post holder must:

- Understand and demonstrate commitment to the aims, principles and policies of Citizens Advice and the CAH service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- Have due regard in the planning and execution of their duties at all times to the aims, principles and policies of CAH and National Citizens Advice.

Other duties and responsibilities

In addition to the above tasks and duties, the post holder will be required to carry out such other tasks and duties which may be identified as being generally compatible with the post and to the aims of CAH.

Special Features (as required):

To attend meetings within CAH and to represent CAH as required within Citizens Advice and to other organisations both during the day and occasionally in the evenings and at weekends.

The post holder will be based at various offices of CAH and may be required to work at any of its service outlets and/or other outreach venues as directed.