Generalist Adviser Job pack

Thanks for your interest in working at Citizens Advice Brent. This job pack should give you everything you need to know to apply for this role and what it means to work with us.

In this pack, you'll find:

- Our values
- 3 things you should know about Citizens Advice.
- Overview of Citizens Advice and Citizens Advice Brent.
- The role profile and personal specification

Want to chat about this role?

If you want to chat about the role further, you can contact the Deputy Chief Executive Officer by emailing recruitment@cabrent.org.uk or calling 07392702125

Our values

1. **Respect and integrity**: We act ethically and transparently in the way we conduct our services and treat all employees, clients and stakeholders with dignity, consideration and understanding.

2. **Passion** – We are passionate about the work we do and are committed to making a positive impact on society. We have a strong sense of public purpose that drives our work and ensures that our clients receive the right information and advice at the right time, to help them make informed, confident decisions.

3. **Ambition** – We are ambitious in our vision and are committed to positive change. To achieve this, we are bold when making decisions and challenging conventional thinking, and we use available evidence and sound judgment to do this.

4. **Creativity** – We foster and sustain an environment which is inclusive, innovative, problem-solving, adaptable and flexible as to how issues are solved. From this, we gain greater knowledge and confidence in our abilities to enhance our individual and collective performances and to deliver a high-quality service to our clients to secure the best possible outcomes.

5. **Excellence** – We challenge ourselves to strive towards excellence, embracing continuous improvement and constantly learning from our collective experience. We take responsibility for our decisions and actions and together, we are helpful, supportive and motivated to work at our best.

6. **Diversity and inclusion**: we promote equity, diversity and inclusion, contributing to a rich and dynamic workplace, fostering innovation and employee well-being.

3 things you should know about us

1. We're local and we're national. We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.

2. We're here for everyone. Our advice helps people solve problems, and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

Generalist Adviser role profile

Role: Generalist Adviser
Day-to-day management: Lead Advice Supervisor
Reports to: Deputy CEO
Hours: Full-time [37.5 hours per week]
Contract: Permanent
Salary: £31,000 - 34,312 per annum
[Depending on casework experience].

The Role

To provide Brent residents with free, accurate and effective generalist advice and casework tailored to their individual circumstances. Advice and support may be delivered face-to-face, by telephone or through other appropriate digital channels.

The postholder will assess residents' advice needs, provide comprehensive generalist advice, undertake appropriate casework to progress or resolve issues, support income maximisation and access to financial or other assistance, and make appropriate referrals where additional or specialist support is required.

The postholder will maintain high-quality case records, work in accordance with Citizens Advice standards and Citizens Advice Brent's policies and procedures, and contribute to the wider delivery, development and research and campaigns work of the service.

Role Profile

Advice and Casework

- Conduct advice interviews using appropriate and sensitive listening and questioning techniques.
- Enable residents to explain their problems and circumstances, identify the issues requiring advice and determine their own priorities.

- Assess residents' advice and support needs and identify appropriate options for progressing their issues.

- Research, interpret and communicate relevant information to provide comprehensive and tailored generalist advice.
- Explain suitable options, including their advantages, disadvantages, implications and potential consequences, enabling residents to make informed decisions.
- Support residents with income maximisation, including appropriate benefit entitlement and better-off calculations and assistance with welfare benefit claims.
- Make, or support residents to make, applications for grants, hardship schemes and other discretionary support where appropriate.
- Undertake appropriate casework, including progressing matters beyond the initial advice stage where further action is required.
- Draft correspondence and, where appropriate, communicate or negotiate with third parties, including statutory and non-statutory organisations, on behalf of residents.
- Make appropriate referrals and signpost residents to other organisations and services where their needs fall outside the scope of the service or where additional support is required.
- Manage casework effectively, including agreed actions, follow-up work, appointments and relevant deadlines.
- Ensure advice and casework comply with Citizens Advice Brent's policies, procedures and working practices.
- Ensure all work meets applicable Citizens Advice quality standards, audit requirements and funders' requirements.
- Maintain timely, accurate and sufficiently detailed case records.
- Complete all required data recording to support service monitoring, information retrieval, quality assurance, evaluation and reporting.
- Ensure all work reflects and supports the organisation's policies and values, including its commitment to Equality, Diversity and Inclusion.

Research and Campaigns

- Contribute to research and campaigns work by identifying relevant issues, providing appropriate case evidence and case studies, and participating in Citizens Advice and approved funder research and campaign initiatives.
- Identify recurring, emerging or systemic issues arising from advice and casework and contribute appropriate evidence to support action on their underlying causes.
- Make residents aware of relevant research and campaign opportunities where appropriate.

- Respond to Citizens Advice Network Panel and approved funder surveys and submit evidence forms or other research and campaign information as required.

Professional Development

- Keep up to date with relevant legislation, case law, codes of practice, policies, procedures, guidance, advice publications and other resources necessary to carry out the role effectively.
- Undertake appropriate Continuing Professional Development (CPD) and other training required to maintain competence and meet Citizens Advice quality assurance standards and funders' requirements.
- Undertake relevant training in information and communication technology, the responsible use of Artificial Intelligence, case management systems and other digital tools, and apply these appropriately in carrying out the role.
- Take responsibility for identifying and pursuing appropriate opportunities for personal and professional development, with support from the line manager.
- Maintain an up-to-date record of relevant training and professional development undertaken.

Administration

- Use computers, digital systems and other technology relevant to the effective performance of the role.
- Use appropriate software and systems for case recording, statistical monitoring, research and campaigns data, funder reporting, record keeping and document production.
- Use the Citizens Advice case management system and relevant office diary or task-management systems to record and manage appointments, actions, follow-up work and deadlines.
- Attend and participate in support and supervision sessions and team and staff meetings.
- Attend relevant internal and external meetings as agreed with the line manager.
- Comply with the organisation's administrative systems, policies and procedures.

Other Duties and Responsibilities

- Meet agreed personal objectives, targets and milestones appropriate to the role.
- Work collaboratively with colleagues to contribute to service-wide targets and key performance indicators.
- Contribute to the achievement of relevant funder requirements, including social value commitments where applicable.

- Contribute positively to the effective delivery, continuous improvement and development of the service.
- Work flexibly across Citizens Advice Brent services and delivery channels, where reasonably required and appropriate to the scope of the role.
- Undertake other duties that are reasonably within the scope and level of the post and necessary for the effective delivery of the service.
- Demonstrate commitment to the aims, principles, policies and values of Citizens Advice and Citizens Advice Brent.
- Comply with health and safety policies and procedures and take reasonable care for your own health and safety and that of colleagues and others who may be affected by your work.

Person specification

The successful candidate will be able to demonstrate:

1. Knowledge and experience of providing generalist advice and undertaking casework, particularly in welfare benefits, debt, housing or employment.
2. A relevant advice or casework qualification, or equivalent demonstrable knowledge and experience, together with a commitment to maintaining and developing professional competence through appropriate Continuing Professional Development.
3. Experience of handling complex or challenging cases and working effectively with residents in vulnerable circumstances, exercising appropriate judgement, sensitivity and professional boundaries.
4. Experience of working to applicable advice quality standards, including maintaining accurate and sufficiently detailed case records and complying with relevant policies, procedures and quality assurance requirements.
5. Strong interviewing and communication skills, including the ability to use sensitive listening and questioning techniques to identify the underlying issues, maintain appropriate structure and focus, and enable residents to make informed decisions and set their own priorities.
6. Good IT and digital skills, including the ability to use case management systems, telephone and digital platforms to deliver advice across different channels and maintain accurate case records.
7. The ability to record and collate accurate service and outcome data to support performance monitoring, evaluation and funder reporting requirements.
8. Experience of, or willingness and ability to work in, outreach and community settings, with an appropriate understanding of confidentiality, information assurance, safeguarding and personal safety requirements.
9. Willingness and ability to work flexibly, including some evenings and Saturdays, to meet service requirements.
10. An understanding of the regulatory requirements relevant to debt advice, including applicable FCA requirements and the Consumer Duty, and the ability to apply these appropriately in advice and casework.
11. A sound understanding of Equality, Diversity and Inclusion and the ability to apply these principles in practice when providing advice and working with residents, colleagues and partner organisations.

Desirable criterion: At least one-year post-qualification experience as a generalist adviser and caseworker, or in an equivalent advice role.