

# Job Opportunity: Generalist Adviser (trainee role available)



**Derbyshire  
Districts**

**Hours: 37 hours per week**

**Salary: £26,366 to £28,825 per annum pro rata** (Dependent on experience)

**Contract: Full-Time, Permanent**

**Base: Chesterfield with occasional travel throughout Derbyshire if required for cover (additional travel expenses will be paid)**

We have an exciting opportunity for a Generalist Adviser to join our existing advice services team who deliver advice to the public on a wide range of issues in Outreach settings across Derbyshire. The post will involve providing both face to face and telephone advice, predominantly based at our Chesterfield office, however there may be an occasional requirement to cover some Outreach locations. The role will require you to provide advice on our main enquiry areas including checking welfare benefit eligibility, assisting clients to make benefit claims, challenging decisions and providing energy advice. There is flexibility in this role which allows for some remote/home working where appropriate.

Applicants need to be computer literate and must be confident in working to performance targets. Good communications skills, both written and verbal are essential in the role, as is excellent customer service skills with a non-judgemental approach. A background in advice giving, energy and/or welfare benefits is desirable but not essential. Full training, support and coaching will be provided.

## **Terms and conditions**

**Annual leave:** 35 days annual leave per year pro rata, including Bank Holidays and four days Christmas Shutdown. Additionally, there is a long service leave of 1-5 days after 4-8 years' service. We also offer an annual leave purchasing/selling scheme.

**Pension:** Auto enrolment into an approved pension scheme. 6% contribution by the organisation, 2% contribution from staff member.

**Sick pay:** 3 months full pay and 3 months half pay (dependent on length of service).

**Other benefits:** Employee assistance programme, including perks

At Citizens Advice Derbyshire Districts we provide free, confidential, impartial and independent advice and information on a wide range of subjects. We value diversity, promote equality and challenge discrimination. We encourage and welcome applications from people of all backgrounds.

The successful candidate will be required to undertake a Disclosure and Barring Service check. The possession of a criminal record will not necessarily prevent an applicant from obtaining this post, as all cases are judged individually according to the nature of the role and the background and circumstances of your offence. Please get in touch to see our policy on DBS checks.

**To view and download the recruitment pack visit:**

**[www.citizensadvice.derbyshiredistricts.org.uk/vacancies/](http://www.citizensadvice.derbyshiredistricts.org.uk/vacancies/)**

**Please send a CV with a completed application form to [hr@ddcab.org.uk](mailto:hr@ddcab.org.uk)**

**Closing date for applications: 9am Monday 30th June 2025**

**Interview date: WC 7th July 2025**

# Job Description

## Generalist Adviser

**Team:** Advice Service Team

**Reports to:** Advice Service Manager

**Role Purpose:** To provide advice sessions in remote locations or our fixed sites, liaise with generalist advice provision and the telephone service, taking responsibility for managing own levels of casework

### Key Responsibilities

#### Advice and Casework:

- Provide advice and casework covering the full range of topics
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning
- To provide face to face advice primarily at an outreach setting but also through other channels including telephone and email as needed by clients and to meet funder requirements or service demand
- Negotiate with third parties such as statutory and non-statutory bodies as appropriate
- Ensure income maximisation through the take-up of appropriate welfare benefits
- Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate
- Assist clients with other related problems where they are an integral part of their case and refer to other advisers or specialist agencies as appropriate
- Ensure that all casework conforms to organisation procedures and policies
- Maintain accurate and detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
- Assist with research and campaign work by providing information about clients' circumstances
- Provide statistical information on the number of clients and nature of cases, and provide regular reports to organisation management
- Ensure all casework conforms to the quality standards, including maintaining accurate records, as set out by Citizens Advice, funders and the Service Manager
- Attend outreach location staff meetings and external meetings as identified with the line manager
- Attend and provide support and advice at food bank locations
- Attend community and stakeholder events where required
- Assist with initiatives for the improvement of services

- Ensure information about the Citizens Advice service is displayed prominently at the outreach location at all times and take responsibility for local publicity and promotion to ensure that potential users are kept aware of the service

### **Teamwork and Relationships:**

- Maintain positive and professional working relationships with all colleagues
- Participate in team meetings, training sessions, and service reviews as required
- Maintain professional and good working relationships with all staff at outreach locations
- Attend away days, development days and events

### **Professional Development:**

- Work with your line manager to identify and pursue your individual training and development needs
- Keep up to date with relevant legislation, case law, policies, procedures, and service delivery changes through ongoing training and self-directed learning

### **Other duties and responsibilities**

- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service
- Demonstrate commitment to the aims and policies of the Citizens Advice service
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- To support and monitor the wellbeing of staff within the organisation and to contribute to maintaining a healthy balanced workforce
- Identify own learning needs and appropriate ways of meeting them
- Work within the organisations policies and procedures

*Please note: This job description is not exhaustive or exclusive. It is intended as an outline of the key areas of activity and may be amended in line with the evolving needs of the organisation*

# Person Specification

## Generalist Adviser

**Team:** Advice Service Team

**Reports to:** Advice Service Manager

**Role Purpose:** To provide advice sessions in remote locations or our fixed sites, liaise with generalist advice provision and the telephone service, taking responsibility for managing own levels of casework

**Essential:**

- Ideally will have knowledge and experience of all Citizens Advice subjects, including the current benefits system, welfare reform, debt and housing. This is not essential in all areas as training will be provided if required
- Effective oral communication skills with particular emphasis on negotiating and representing
- Effective writing skills with particular emphasis on negotiating and representing and preparing reviews, reports and correspondence
- Ordered approach to casework and an ability and willingness to follow and develop agreed procedures
- Understand the issues involved in interviewing clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities
- Numerate to the level required in the tasks
- Ability to check the accuracy of calculations
- Ability to use IT in the provision of advice and the preparation of reports and submissions
- Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively
- Ability and willingness to work as part of a team
- Ability to monitor and maintain own standards
- Demonstrate understanding of social trends, issues facing society and their implications for clients and service provision
- Ability to commit and work within the aims, principles and policies of the Citizens Advice service
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy
- An understanding of equality and diversity and its application to the provision of advice
- Possession of a full driving licence and use of a car, or otherwise able to fulfil the travel requirement

**Desirable:**

- Up to date in depth knowledge of the benefits systems
- Ability to carry out accurate benefit check calculations
- Basic knowledge of multiple enquiry areas such as housing and debt to aid with identifying emergencies and making referrals where appropriate

**Expectations of staff:**

- Adhere to organisation policies in relation to the use of ICT and information assurance
- Raise Research and Campaign issues and take action for individuals and spot trends
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation for the project or funder
- Provide a good quality experience for clients
- Provide reports to the line managers at the end of every quarter by project - without prompt
- Be responsible for own administration, record keeping, diaries and filing
- Be a resource for the organisation – for volunteer advisers to use your expertise and skills
- Provide support to supervisors and other colleagues
- Provide cover when requested
- Provide good quality case studies
- Record client feedback both positive and constructive, and take appropriate action
- Be proactive around the organisation
- Be responsible for own training and development
- Promote the organisation and its services externally to ensure good relationships and positive outward facing image

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