

MACMILLAN MIDLANDS ADVICE SERVICE

### Job Opportunity: Generalist Adviser

(Supporting the Macmillan Money and More Benefits Casework Project)

**Hours:** Full-Time (37 hours per week)

**Contract:** Permanent

**Salary:** £29,806.00 per annum, pro rata

**Location:** Derbyshire (Remote working with travel to healthcare and community settings and quarterly meeting in the local office)

### Make a Difference to People Affected by Cancer

Citizens Advice Derbyshire Districts is seeking a **dedicated** and **experienced** Generalist Adviser working as a Macmillan Money & More Benefits Caseworker.

This is an exciting opportunity to provide **specialist welfare benefits advice** and casework to people affected by cancer, helping them navigate financial challenges and access the support they are entitled to. Working as part of a **compassionate** and **professional** team, you will play a vital role in **reducing financial hardship** and **improving wellbeing** for clients at some of the most difficult times in their lives.

### About the role:

We're looking for **highly motivated** and **committed** individuals to provide **specialist advice** and representation on **welfare benefits, grants and financial support**, managing a caseload that includes complex cases, mandatory reconsiderations and appeals. The role supports clients across all stages of the cancer pathway, including diagnosis, treatment, palliative care and end-of-life support. You will deliver advice through a range of channels including **telephone, email, digital platforms** and **face-to-face** appointments within healthcare and community settings.

### Key Responsibilities:

- Deliver **specialist welfare benefits advice** and casework.
- Manage a varied caseload, including **complex benefit appeals** and tribunal work.
- Support clients to **maximise income** through benefits, grants and other financial assistance.
- **Advocate and negotiate** on behalf of clients with third parties.
- **Work collaboratively** with healthcare professionals, community organisations and partner agencies.
- Maintain **accurate case records** and meet quality assurance standards.
- Contribute to service **development, research and campaigns** work.

We welcome and encourage applications from people of all backgrounds. We are proud to be a **Disability Confident Employer** and hold the **Derbyshire LGBT+ Rainbow Accreditation**.

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To view and download the recruitment pack and to apply for the role visit:  
[www.citizensadvisederbyshiredistricts.org.uk/staff/](http://www.citizensadvisederbyshiredistricts.org.uk/staff/)

**Closing date:** 9am, Monday 20 July 2026

**Interviews:** TBC



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#### Who we are looking for:

The ideal candidates will have:

- **Significant experience** providing welfare benefits advice and casework, including Mandatory Reconsiderations and Appeals. (essential)
- A **strong understanding of welfare benefits legislation** and financial support available to vulnerable clients. (essential)
- Experience **supporting vulnerable people** using a person-centred and empathetic approach (essential)
- Experience managing a caseload and achieving **targets and deadlines** (essential)
- A commitment to **equality, diversity and inclusion** (essential)
- Excellent **communication skills** – both written and verbal (essential)
- A **non-judgemental, empathetic approach** to people (essential)
- Strong **IT and digital skills**, with the ability to learn new systems quickly (essential)

#### What we offer:

We're proud to offer a comprehensive benefits package that supports your wellbeing, work-life balance, and professional growth:

- **Generous annual leave:** 35 days per year (pro rata), including all bank holidays and Christmas
- **Buy/sell leave scheme:** Flexibility to buy or sell up to one week of leave each year (pro rata)
- **Employee Assistance Programme:** Includes wellbeing support, free counselling, and lifestyle perks
- **Contractual sick pay:** depended on length of service
- **Long service rewards:** Extra leave and gift cards after five years of service and beyond
- **Workplace pension:** Auto-enrolment into our pension scheme
- **Hybrid working:** the option to work from home, if it works for you and for us

Successful candidates will be required to undertake an **Enhanced** Disclosure and Barring Service (DBS) check and provide proof of Right to Work.

Please note that Citizens Advice Derbyshire Districts does not hold a sponsor licence.

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# Job Description

## Generalist Adviser

(Macmillan Money and More)

**Team:** Advice Service Team

**Reports to:** Advice Service Manager

**Role Purpose:** To provide specialist advice and casework on welfare benefits, tax credits, grants, and related financial issues to people affected by cancer, helping to reduce financial hardship and improve wellbeing. The role supports clients across key stages of the cancer pathway, including diagnosis, treatment, palliative care, and end-of-life support.

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 - Macmillan Money and More:

- Provide specialist advice to individuals on:
  - Welfare benefits
  - Local authority entitlements and grants
  - Financial hardship and related issues
- Assess client needs and develop tailored support plans
- Act on behalf of clients, including negotiating with third parties and carrying out MR and appeals work
- Refer clients to internal specialists or external agencies where required
- Manage a caseload, including complex cases

#### Advice and Casework – Generalist Advice:

- 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
- 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
- Attend and provide support and advice at food bank locations
- 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

## **Service Delivery:**

- Contribute to achieving project targets relating to the number of individuals supported.
- Deliver advice through multiple channels appropriate to the clients needs:
  - Face-to-face (including local office, outreach locations and hospital/healthcare settings)
  - Telephone
  - Email and digital platforms
- Work closely with Frontline Specialist Advisor
- Work within NHS cancer settings and community venues as required

## **Service Development:**

- Contribute to service improvement and development activities
- Participate in peer reviews and team meetings
- Gather feedback from clients and stakeholders to improve service delivery

## **Training & Professional Development**

- Maintain up-to-date knowledge of benefits legislation and advice practices
- Attend training and supervision sessions
- Engage in continuous professional development
- Work with your line manager to identify and pursue your individual training and development needs
- Keep up to date with policies, procedures and legislation relevant to the organisation and areas specific to the posts responsibilities

## **General Responsibilities**

- Deliver a client-centred, non-judgmental service
- Uphold Citizens Advice values, equality, and diversity principles
- Follow safeguarding and health & safety procedures
- Work collaboratively with colleagues and partners

## **Case Recording and Information Management**

- Maintain accurate and timely case records in line with organisational policies and data protection requirements.
- Record client interactions and outcomes within the programme's case management system.
- Ensure documentation meets required quality and audit standards.
- Handle sensitive information in line with GDPR and confidentiality policies
- Ensure compliance with Citizens Advice quality standards (AQS) and Macmillan requirements
- Ensure all casework conforms to the quality standards, including maintaining accurate records, as set out by Citizens Advice, funders and the Service Manager
- Provide statistical data and case outcomes as required
- Handle sensitive information in line with GDPR and confidentiality policies

## **Safeguarding and Risk Management**

- Identify safeguarding concerns and follow organisational safeguarding procedures, where necessary.
- Ensure vulnerable clients receive appropriate support and escalation where

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required.

- Maintain professional boundaries while delivering compassionate, person-centred support.

### **Service Delivery and Quality Assurance**

- Contribute to achieving programme targets relating to the number of individuals supported.
- Participate in service development and continuous improvement activities.
- Attend supervision sessions, team meetings, and training as required.
- Provide statistical information on the number of clients and nature of cases, and provide regular reports to organisation management
- Contribute to research and campaigns by identifying trends affecting clients
- Provide case studies and evidence to support policy work

### **Teamwork and relationships:**

- Maintain positive and professional working relationships with all colleagues.
- Participate in team meetings, training sessions, and service reviews as required.
- Attend outreach location staff meetings and external meetings as identified with the line manager
- Attend community and stakeholder events where required
- Assist with initiatives for the improvement of services
- Attend away days, development days and events.

### **Behavioural responsibilities:**

- To support, promote and comply with the Equality, Diversity and Inclusion actions and requirements when undertaking the duties of this post.
- To respect the sensitivity and confidentiality of any information that they may have access to in adherence with the Data Protection policies.

### **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

# Person Specification

## Generalist Adviser

(Macmillan Money and More)

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**Reports to:** Advice Service Manager

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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:

- Proven experience of providing welfare benefits advice and casework, including complex cases, MRs & Appeals up to tribunal level.
- Experience of managing a caseload, prioritising work, and meeting targets and deadlines
- Experience supporting vulnerable clients, using a person-centred and empathetic approach
- Experience of working in a multi-agency environment or referring to external support services
- Understanding of safeguarding principles and working with vulnerable adults
- Knowledge of confidentiality, GDPR, and data protection requirements
- Strong and up to date working knowledge of:
  - Welfare benefits system
  - Grants and financial support available to clients to maximise their income
  - Issues affecting individuals experiencing financial hardship
- Accurate carry out benefit check calculations
- Knowledge and experience of all Citizens Advice subjects, including the current benefits system, welfare reform, debt and housing.
- 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
- 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
- Possession of a full driving licence and use of a car, or otherwise able to fulfil the travel requirement

## **Skills and Abilities:**

- Excellent communication skills (both written and verbal), with the ability to explain complex information clearly
- Ability to assess client needs and develop a tailored support plans
- Strong negotiation and advocacy skills, including liaising with third parties on behalf of clients
- Ability to work independently and collaboratively
- Strong organisational and time management skills, with attention to detail
- Competent IT skills, including use of case management systems and digital communication tools such as outlook 365 programmes and AI
- Ability to maintain accurate and high-quality case records to meet our Quality Assurance Accreditation
- Ordered approach to casework and an ability and willingness to follow and develop agreed procedures
- 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

## **Desirable:**

- Proven experience of providing welfare benefits advice and casework, including complex cases, MRs & Appeals at tribunal level
- Experience working within Citizens Advice or a similar advice setting
- Experience supporting individuals affected by cancer or serious illness
- Experience working in partnership or within healthcare or NHS environments
- Experience providing benefit advice to cancer patients and/ or carers
- Knowledge of NHS systems and cancer care pathways
- Relevant Citizens Advice training or accreditation

## **Personal Attributes:**

- Empathetic, compassionate, and non-judgemental approach
- Commitment to equality, diversity, and inclusion
- Professional, with the ability to maintain appropriate boundaries
- Flexible and adaptable to changing demands
- Committed to continuous learning and development

## **Other Requirements and Expectations of Staff:**

- Willingness to undertake training and professional development
- Ability to obtain and maintain an enhanced DBS check
- 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

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- 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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