

Caseworker (Specialising in debt)

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

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice South West Surrey
- The role profile and personal specification
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact Emma Adams (emma.adams@casws.org.uk)

Our values

We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

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.

Citizens Advice South West Surrey

Citizens Advice South West Surrey covers the areas of Waverley and Guildford Boroughs. Both borough areas are often considered to be affluent with high levels of employment and rates of home ownership. However, there are significant pockets of deprivation. We're an independent local charity and limited company supporting some of the most vulnerable in our community.

We have 6 offices, in Ash, Cranleigh, Farnham, Godalming, Guildford and Haslemere, as well as delivering services at outreach in communities. We provide free, confidential, impartial and independent information, advice, casework and support for the benefit of the local community, as well as using our unique evidence based approach to exercise a responsible influence on policy and practice to address the underlying cause of problems for our clients.

Governed by a board of 8 trustees, we have a highly skilled workforce to support the organisation. This includes 38 staff and 145 volunteers.

We provide a generalist advice service through which the public can access advice from Monday to Friday through email, in person and over the telephone. Our core funding is primarily provided by Guildford Borough Council, Waverley Borough Councils and the Town and Parish Councils across Waverley, with additional support from donations.

In addition to our generalist advice service, we run 7 targeted and specialist services.

- **Cancer service** is funded by Macmillan Support and provides welfare benefit advice to people in Guildford, Waverley and Surrey Heath who are affected by cancer and is a largely telephone-based service. We also have an outreach service funded by and operating from the Fountain Centre for those being treated at Royal Surrey Hospital.
- **Mental Health service** provides a casework service (predominantly welfare benefits, debt and housing) to people with mental health issues. The service is currently available for people under secondary mental health care and is funded by the Surrey Heartlands Integrated Care Board, and Guildford and Waverley Alliance.
- **Work Wise** is part of Surrey's IPSPC programme and supports clients who have mental health issues, learning or other disabilities, with housing and benefits issues, in particular better off in work calculations.
- **Specialist Debt advice** - this includes advice to some of the most financially excluded groups in society funded by the Money and Pensions Service (MaPS).
- **Homelessness Prevention** is funded by Guildford Borough Council and is designed to support people who are at risk of homelessness by supporting them with debt, benefits and housing issues.
- **Community Engagement** is funded by Waverley Borough Council and Community Foundation for Surrey to provide those residents with the highest level of deprivation in Waverley the opportunity to improve their own life chances by bringing together partners to develop tools, community action and advice.
- **Advice First Aid** provides training to key community partners to give support to residents through information and signposting, funded by Surrey County Council in partnership with SGN and other local Citizens Advice in Surrey.

Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

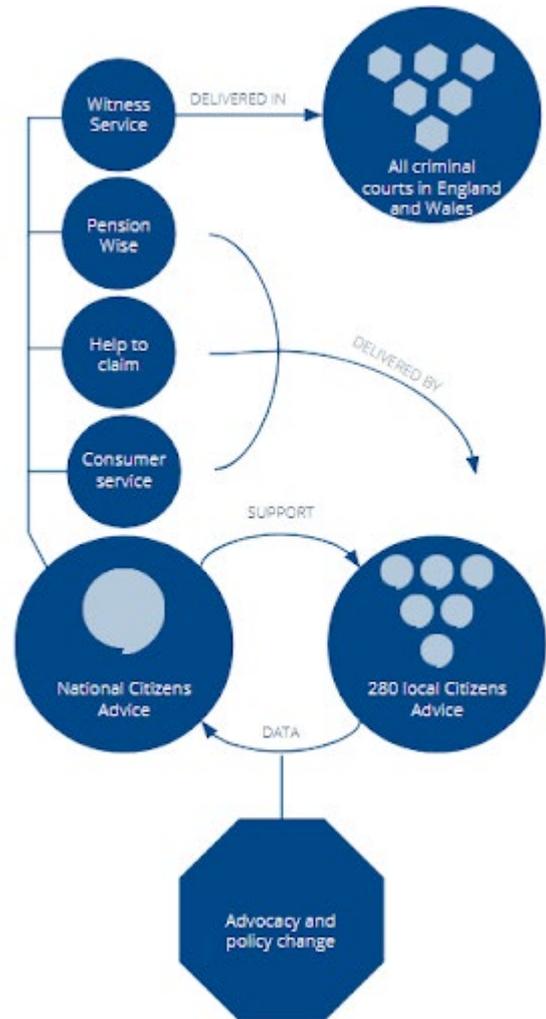
This role sits our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.





The role

37 hours a week

£27,176.34 - £30,195.93

Permanent

With the cost of living at an all-time high, individuals and families are facing increasing challenges. Citizens Advice is seeing record demand for our services, and now more than ever, we need dedicated individuals to help make a positive impact.

As a **Caseworker**, you'll directly support clients dealing with complex issues like debt, housing, benefits, and employment. You will assess their situations, provide clear, actionable advice, and advocate on their behalf with local authorities and service providers. You'll deliver specialist debt advice, helping clients to understand the options available to them, helping them budget and maximise their income, as well as negotiating with creditors.

This role offers the opportunity to help people navigate difficult circumstances by offering practical solutions and emotional support. Your ability to listen empathetically, analyse issues, and provide tailored advice will be key to empowering clients to overcome their challenges.

We're looking for someone with a 'can-do' attitude who is passionate about social justice and keen to make a real difference in people's lives.

By joining **Citizens Advice**, you'll become part of a team that values integrity, collaboration, and inclusion. You'll work alongside experienced professionals in a supportive environment that encourages growth and development. If you're ready to take on a vital role that will positively impact your community, we'd love to hear from you.

Deadline for this role is 9am Monday 5th May 2025

The Citizens Advice service values diversity, promotes equality and challenges discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled and Black, Asian and Minority Ethnic people, as they are currently underrepresented in our workforce.



Role profile

Role	Caseworker (specialising in debt)	
Job family	Service Delivery	
Reporting to	Casework Team Manager	
Salary / Grade	£27,176.34 - £30,195.93	
Hours	Full time (37 hours)	
Location	<p>Guildford, Godalming and Farnham - with travel to other locations expected as needed</p> <p>Flexibility for some remote working dependent on service and client need as agreed between teams</p>	Level of travel: Medium
Team overview	The CASWS Service Delivery team is structured to reflect the different levels of advice and delivery across the organisation, ranging from information to full casework.	
Role purpose	To deliver up to casework level support to agreed standards	
Functional responsibilities /competencies	Key elements/Tasks	% of Time
<p>Service Delivery – take responsibility for the delivery of casework level services in CASWS locations and remotely.</p>	<ul style="list-style-type: none"> · Accept referrals and undertake delivery of casework to progress clients to achieve the right outcomes, in line with relevant contracts and projects. · Meet funder targets and requirements. Explore clients' issues and circumstances in enough detail to work out next steps, including: <ul style="list-style-type: none"> · identifying key dates and time limits relating to client's issues · reviewing case records and referrals accurately and objectively, ahead of appointments where the client is a returning client · explore and understand client capability to tailor your support · Explain and obtain consent for referral for partner agencies and what will happen · Provide casework to relevant standards, covering the full range of issues on debt, welfare benefits and housing, depending on relevant project requirements, including: <ul style="list-style-type: none"> · Using AdviserNet, other valid and/or trusted adviser resources, and relevant legislation to research, analyse and correctly interpret information and identify possible options appropriate to the client's circumstances. 	50%

- Assess client's capability to agree appropriate next steps to progress their case and achieve the right outcome.
- Deliver casework and advice through face to face, telephone or digital channels, according to client need and preference.
- Correctly identify and agree next steps with clients and who is doing what within appropriate timescales, including giving practical help where appropriate
- Negotiate and advocate on behalf of the client to achieve desired outcome (where appropriate) including:
 - Developing relationships with relevant local service providers to act on behalf of the client effectively
 - Taking responsibility for actions on behalf of a client
 - Prepare cases for representation in court or a tribunal
 - Represent clients at tribunals and other review, appeal or proceedings, using the approach and tactics most likely to achieve best possible outcome (where applicable)
- Negotiating with creditors on a client's behalf
- Assessing the best strategies and options to support clients' debt i Making ssues whilst providing budgeting advice and looking at ways to maximise income.
- You will provide a holistic advice service and facilitate clients to access support in any other areas of advice which they need.
- Effectively consult with the Advice Supervisor, Casework Team Manager, other relevant supervisors, in-house specialist, Expert Advice Team or external specialists as appropriate
- Make internal and external referrals
- Ensure compliance with relevant standards, including Money and Pension Service, FCA requirements and Citizens Advice Quality of Advice standards.
- Effectively manage and prioritise caseload, keeping clients informed of progress, alerting your line manager to any barriers to effective working and use casework to support the advice service (to maintain and improve standards) including:
 - effective use of planning tools and regularly review outstanding casework to prioritise workload
- Engaging in Quality of Advice Assessment (QAA) processes, including file reviews, reflect on the evaluations and feedback given, and seek to continuously improve the quality of advice given to clients
- Gather feedback on the service provided
- Support our research and campaigns work, including submitting evidence forms.

<p>Use client management system - to accurately record client interactions and meet service and funder requirements</p>	<ul style="list-style-type: none"> · Find existing clients, update client records, permissions/consent, or create a new client on Casebook · Understand the Quality of Advice Assessment (QAA) process and adds case notes to client records that meet the quality standards (including using Advice Issue Codes (AICs)) · Use the system to book appointments, add tasks and/or refer to other local Citizens Advice. · Obtain and record client consent for referrals to external agencies, and authority to act, and attach documents to case record · Record client outcomes · Contribute to/write reports relevant to the role · Provide required data, case recording and information to support contract requirements, including case studies. 	<p>35%</p>
<p>Team – work as part of a wider caseworker and organisational team</p>	<ul style="list-style-type: none"> • Participate in organisational initiatives to develop and improve services. • Prepare for and attend supervision sessions and other meetings with your line manager as appropriate. • Maintain good working relationships with the wider casework and service delivery team, participating and contributing to caseworker meetings. • Take part in team and peer support activities. • Work with volunteer caseworkers where agreed, delegating and supporting where appropriate to delivery. • Work with the Service Delivery Assistant to ensure a smooth client journey from initial contact to close of case. • Contribute to a positive working environment in which equality and diversity are well-managed, dignity at work is upheld and team members are motivated to do their best. 	<p>10%</p>
<p>Other</p>	<ul style="list-style-type: none"> • Develop and maintain working relationships with other professionals and stakeholder working with our client groups, including representing the service at meetings with other agencies and delivering information sessions as appropriate. • Promote the service to client and stakeholders • Keep up to date with legislation, caselaw, policies and procedures. • Undertake appropriate training and activities to maintain standards. • Manage your own day to day activities to deliver tasks on time and to the required standard while gaining experience and expertise in support. 	<p>5%</p>

	<ul style="list-style-type: none">• Deputise for the Casework Team Manager from time to time.• Undertake other duties as may be reasonably required within the scope of the role.	
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Person specification

Essential criteria

1. **Organised, proactive and self-motivated, with the ability to identify barriers to success and know when to seek help in resolving them.**
2. **Thorough understanding of the relevant advice topics, including debt, benefits and housing, with the ability to work with clients on a range of solutions, working to relevant Advice Quality Standards.**
3. Excellent communication skills - face to face, in writing and over the phone, with the ability to use sensitive listening and questioning to get to the root of the issues and empower clients, whilst maintaining structure and control of meetings with them.
4. Excellent organisational and administrative skills, including the ability to write accurately and concisely in a timely manner, with good literacy and numeracy skills relevant to the role.
5. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
6. Ability to prioritise own work, meet deadlines and manage workload in a busy environment with competing demands.
7. A commitment to continuous professional development, including a willingness to develop knowledge and skills to carry out the role.
8. A willingness to work with people from diverse backgrounds, whilst giving advice in a non-judgemental way.
9. Ability to work independently, and away from the office.
10. Proficient in use of digital systems, including case management, remote working, and Office 365 applications, and the ability to use required management systems, tools and processes for the purposes of the role.

Items in **bold** will be given higher priority in recruitment process

Requirements for role

1. Work within our organisational key principles - *you are able to work within our key principles to deliver a service that is Confidential, Free, Impartial and Independent*
2. Embed Equity, Diversity and Inclusion (EDI) in day to day work- *You understand the policies and approach to Equity, Diversity and Inclusion, and are able to use this knowledge to create and support an equitable, diverse and inclusive service and office*
3. Provide a service that meets legal and regulatory requirements and understand the purpose of quality assurance systems - *You understand the legal and regulatory requirements that apply to your role and know what to do to ensure they're met.*
4. *Use systems relevant to the role - You have the digital skills needed to use the tools, software and platforms relevant to your role.*

5. Describe the range of services provided across the organisation - *You understand that Citizens Advice services are national and local, across England and Wales, and know what the different parts of the service do, both in your office and wider organisation.*
6. Be collaborative, supportive, inclusive and have integrity - *You contribute towards a safe, positive and inclusive working environment where everyone can be themselves.*
7. Work constructively with others, individual and as teams - *You are able to work by yourself, with others and in teams, effectively, productively and constructively.*
8. Personal Development - *You contribute proactively to the assessment of your role and team and work to continually improve.*



What we give our staff

Financial Benefits

Pay

See Job Description / role profile.

Our pay policy includes progression as people train and develop experience, as well as an annual review which considers cost of living rises. Each salary grade has three bands and we will offer the starting salary (band 1) to anyone without prior experience of the role. Once training is complete and you have achieved competency in the role, you will move to the mid-point salary (band 2).

We also benchmark our salaries against market trends to make sure your pay is in line with the wider market.

Pension

Citizens Advice South West Surrey will provide an employee pension scheme with employer contributions of 5% of the applicable earnings amount into this scheme.

Perks and Savings

Through our partnership with TELUSHealth (formerly LifeWorks), we are able to support our colleague's financial wellbeing with savings on everyday purchases and important life events, such as getting married, buying a home or car, family outings and holidays.

Free on-site tea, coffee and milk

Providing a good working environment for colleagues is important to us which is why we offer staff on-site access to free hot beverages in all our offices.

Sickness payments

When you're ill we offer enhanced sick pay of:

- up to 2 weeks during your probation period,
- 1 month's full pay and 2 months' half pay after this and up to 2 years,
- 2 months' full pay and 2 months' half pay, after 2 years of service.

Expenses

CASWS will cover subsistence and travelling expenses reasonably and properly incurred in the course of your employment and with prior approval in line with an updated expenses policy. This will cover business travel only and not regular commuting costs.

Work-life balance

Working hours

See Job Description / role profile. Full-time paid colleagues are contracted to work 37 hours per week. Those working over 6 hours must take an unpaid half hour break.

We are open to discussion about flexible working, which may include arrangements such as part-time working, fixed (non-standard) working hours, working from home and job sharing.

Annual Leave

Colleagues are given 26 days annual leave, plus bank holidays, pro rata per year from 1 January to 31 December. Two days of long service leave are also awarded, with one additional day after completion of 4 years' service, and a further day after completion of 6 years' service.

We close on all public holidays and, at the discretion of CASWS, for up to 5 days during the Christmas period. You are required to take such days as part of your paid leave entitlement if that is a day on which you would otherwise be working. We also recognise that sometimes additional leave is needed for circumstances beyond someone's control like a bereavement and offer additional discretionary special or compassionate leave.

Maternity, adoption and shared parental leave

We offer maternity, adoption and shared parental leave schemes in line with statutory entitlements.

Flexible working

We understand that staff who balance their work and home responsibilities effectively are more engaged and productive. We are committed to providing a successful Work-Life Balance approach, which balances the needs of the service with individual wellbeing. Examples of flexible working arrangements might include:

- Working part-time or job sharing
- Changing your hours of work
- Working from home for part or all of the time

Location

See Job Description / role profile.

All employees will have agreed location(s) which are determined by the requirements of the role. Most roles will have a reasonable expectation to work across locations in our area, dependent on the need of the role.

Employment Status

Permanent. (In some circumstances we will offer fixed term roles where the role is for genuine fixed-term transformation or cover).

Health and wellbeing

Employee assistance programme (EAP)

Our employee assistance programme, provided through our partnership with TELUSHealth (formerly Lifeworks) gives everyone working at the organisation immediate access to professional and completely confidential counselling and advisory services.

The service also provides:

- A free 24 hour, 365 days a year confidential helpline of which the issues do not need to be work-related
- Advice on a wide range of issues - legal, consumer, family, financial, medical, work, stress
- Free counselling - via telephone or face-to-face
- Free advice and counselling (not face-to-face) for staff family members residing at the same address
- Serious illness and accident cover support
- Staff management - support to managers from counsellors, HR specialists, or OH psychologists
- The EAP has a website with supporting materials and an app is also available

Most of the services can also be used by members of your family normally resident with you, including children living away from home at college or university.

TELUS Health - All colleagues have access to our TELUS Health platform which contains a range of courses and tools to help you navigate life changes and issues.

Togetherall - All colleagues have access to Togetherall which is an online mental health and wellbeing service that offers anonymous, confidential peer support 24 hours a day, 365 days a year.

Occupational Health (OH) service

The OH service used by CASWS is aimed at supporting all paid colleagues in the workplace, including advising on return to work after long term absence or advising on workplace adjustments as appropriate.

Free eye tests

You're entitled to a free full eye test, every year in some cases and we'll provide a voucher for this. If you need special corrective glasses and lenses for regular use of computers, we'll cover the cost of these or a contribution to them if you want to upgrade them.

Learning, development and growth opportunities

Our people are at the heart of our service and we recognise that as individuals grow, learn and develop - so too does our organisation.

Regular training

We have a co-ordinated training plan. This means we will provide training for you in your role and support you in taking forward opportunities for your development.

Regular 1-2-1 support sessions with your manager

We think it is important that you get regular time with your line manager which is why all colleagues have regular support sessions with their line manager to discuss performance, personal development and organisational development opportunities.

Equity, Diversity, and Inclusion

At Citizens Advice South West Surrey, we recognise the positive value of diversity, promoting equity and celebrating inclusion. We welcome and encourage job applications from people of all backgrounds.

Our aim is that our workforce will be truly representative of all sections of society. Everyone should feel respected and valued and able to achieve their full potential. You can read more about our approach to equality, diversity and inclusion [here](#).

Network groups

You can join one of our nationwide staff equity groups that include:

-  Race, ethnicity and cultural heritage group
-  Disability group
-  LGBTQ+ group
-  Trans and Non binary group

These provide peer support, influence in the organisation and run various events throughout the year.

Dignity at work

Citizens Advice South West Surrey is committed to providing a culture in which all staff value each other and can work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

We have clear fundamentals and values which we developed with our staff, volunteers and trustees. These are at the heart of our work and include our purpose, how we deliver this, who we support, our identity and how we show this. This includes core values and behaviours we expect all our people to demonstrate – collaborative, inclusive, supportive and with integrity.

All our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

Political Impartiality

An important part of the principle of impartiality is that Citizens Advice staff are seen to be upholding the principle of party-political impartiality. To avoid misunderstanding or conflicts of interest, guidelines have been established on staff taking part in party political activities. If you currently hold or are intending to stand for local or national political office, then we will expect you to tell us about this if shortlisted for interview.

Disclosure and barring service checks (DBS)

Some positions may require people undergo a DBS check. We follow [national Citizens Advice policy on this](#), to ensure all sensitive information is handled appropriately.