

# Information & Advice Worker



**37 hours a week**

**£23,493.00 and £26,102.00 (1 FTE)**

## **Permanent**

Are you passionate about helping people access the support they need to overcome life's challenges? Citizens Advice is looking for a dedicated Information and Advice Worker to join our team and provide vital support to individuals facing issues such as housing, benefits, debt, and employment. With the cost of living soaring, more families than ever are struggling to make ends meet, and our services are in higher demand than ever before.

In this role, you'll be on the front line, delivering accurate and timely information and advice to help clients navigate their challenges. You'll assess their situations, listen to their concerns, and identify the best next steps to move them forward, whether that's guiding them through financial difficulties, connecting them to relevant resources, or explaining their rights and responsibilities.

We're also excited to launch a new Fuel Poverty project, where you will play a key role in helping clients struggling with energy costs. You'll support clients in maximising their income, advising on tariff charges, and providing practical solutions to reduce energy costs.

By joining Citizens Advice, you'll become part of a team that's truly making a difference. You'll work alongside a passionate and supportive team in an environment that values integrity, inclusion, and collaboration. If you're ready to make a tangible impact in your community and help people find a way forward during tough times, we'd love to hear from you.

**Deadline for this role is 9am Monday 28 April 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.**

To take up this post you must have the right to work in the UK. Please note that Citizens Advice South West Surrey does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.



# Role profile

<b>Role</b>	<b>Information and Advice Worker</b>	
<b>Job family</b>	Service Delivery	
<b>Reporting to</b>	Advice Team Manager	
<b>Salary / Grade</b>	£23,493.00 - £26,102.00 FTE	
<b>Hours</b>	37 hours a week	
<b>Location</b>	<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>	<b>Level of travel:</b>  Medium
<b>Team overview</b>	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.	
<b>Role purpose</b>	To deliver up to advice level support to agreed standards	
<b>Functional responsibilities / competencies</b>	<b>Key elements/Tasks</b>	<b>% of Time</b>
<b>Service Delivery</b> – take responsibility for initial contact with clients primarily by phone or face to face	<ul style="list-style-type: none"><li>• Respond to referrals, answer initial contacts, and provide information or discrete advice to help clients achieve desired outcomes, following relevant contracts and projects.</li><li>• Assess clients' situations, identify key dates and time limits, and determine next steps (e.g., signposting, internal referrals, self-help).</li><li>• Explore legal issues, personal circumstances, and actions taken to decide if tailored advice can be given or if the case requires longer-term support.</li><li>• Obtain client consent for referrals and explain the process to partner agencies.</li><li>• Provide accurate advice across a range of issues via face-to-face, phone, or digital channels, using valid information sources.</li><li>• Explain clients' options, rights, responsibilities, and implications in an understandable way, and recommend appropriate actions.</li><li>• Empower clients to resolve issues independently where possible, offering relevant information.</li><li>• Effectively signpost, transfer, and refer clients internally and externally.</li></ul>	<b>75%</b>

	<ul style="list-style-type: none"> <li>• Consult with supervisors, specialists, and external teams as needed to ensure effective client support.</li> <li>• Ensure compliance with industry standards (e.g., FCA, Money and Pension Service, Citizens Advice Quality standards).</li> <li>• Gather client feedback and support research and campaigns work by submitting evidence forms.</li> </ul>	
<b>Use client management system</b> - to accurately record client interactions and meet service and funder requirements	<ul style="list-style-type: none"> <li>• Update client records, permissions/consent, or create new clients on Casebook.</li> <li>• Understand the Quality of Advice Assessment (QAA) process and add case notes that meet quality standards, including using Advice Issue Codes (AICs).</li> <li>• Use the system to book appointments, add tasks, or refer to other Citizens Advice services.</li> <li>• Obtain and record client consent for external referrals and authority to act, attaching relevant documents.</li> <li>• Record client outcomes and contribute to or write relevant reports.</li> <li>• Provide required data and case information to support contract needs, including case studies.</li> </ul>	<b>15%</b>
<b>Team</b> – work as part of a wider advice and organisational team	<ul style="list-style-type: none"> <li>• Contribute to organisational initiatives to improve services.</li> <li>• Attend supervision sessions and meetings with your line manager.</li> <li>• Maintain positive relationships with the advice and service delivery team, participating in relevant meetings.</li> <li>• Engage in team and peer support activities.</li> <li>• Support and delegate tasks to volunteer advisers where appropriate.</li> <li>• Foster a positive work environment, promoting equality, diversity, and team motivation.</li> </ul>	<b>5%</b>
<b>Other</b>	<ul style="list-style-type: none"> <li>• Stay updated on legislation, case law, policies, and procedures.</li> <li>• Complete relevant training to maintain standards.</li> <li>• Manage daily tasks to meet deadlines and deliver quality work while gaining experience.</li> <li>• Deputise for the Advice Team Manager as needed.</li> <li>• Undertake other reasonable duties within the role's scope.</li> </ul>	<b>5%</b>



# 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. **Ability to work with clients in a structured way which empowers them to find effective solutions using relevant information.**
3. Understanding of the relevant subject areas, and ability to work to relevant Advice Quality Standards.
4. 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.
5. 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.
6. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
7. Understanding of the difference between signposting, referral and transfers.
8. Ability to prioritise own work, meet deadlines and manage workload in a busy environment with competing demands.
9. A willingness to work with people from diverse backgrounds, whilst giving advice in a non-judgemental way.
10. Ability to work independently, and away from the office.
11. 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*