

Generalist Advisor

Citizens Advice Rotherham & District Employment pack

Thank you for your interest in working at Citizens Advice Rotherham and District. This job pack should give you everything you need to know to apply for this role and what it means to work for Citizens Advice.

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Section 1: About us



Job Description & Person Specification

Job Title: Generalist Advisor

Reporting to: Service Delivery Manager

Hours: 37.5 hours per week (Mon- Fri 9-5) (**Part time hours may be considered, please specify hours preferred**)

Term: Permanent Position

Location: Office/Outreach settings- Rotherham

Salary: Starting from £24,636

Annual Leave: 30 days (plus bank holidays)

Closing Date: On-going - Applications will be reviewed on receipt, and the vacancy will close once sufficient applications are received. Therefore early application is advised.

Role overview

Citizens Advice Rotherham & District (CARD) is looking for a Generalist advisor to join our busy and friendly Advice team to provide an effective service for clients contacting our local and national services. This is an exciting opportunity to help us meet increasing demand for our advice services in these challenging times.

We are seeking candidates with helpline/busy call centre and customer service experience, to provide high quality information and advice to clients on a wide range of subjects. Training in advice areas will be given to the candidate who can demonstrate a passion for making a difference and the necessary research, customer service and digital skills required for this role. The successful candidate will work in the Advice team, supporting clients via multiple channels including via an inbound telephone service, face to face, during drop in sessions, webchat/emails and within outreaches across Rotherham.

Main Duties

- Provide high quality information and advice to clients via multiple channels including via the inbound telephone service, during face to face appointments and throughout drop-in sessions, via video, email/webchat and within outreaches across Rotherham.
- Make an assessment of the client's needs, identifying options and solutions to empower the client to find a way forward.
- Support clients by guiding them to information and advice, making an internal referral or signposting to external and internal help as needed.
- Provide full advice to move clients forward if needed, according to the principles of the Advice Framework.
- Have a passion for delivering excellence in customer service through an inbound telephone service, and be able to adapt and communicate clearly with a wide range of people via multiple channels to meet client and service needs.
- Maintain, build and expand on own advice competence, through completing adviser training and achieve full advice certificate within 6 -12 months of joining.

Conduct and deliver advice holistically across the advice service to meet client demand including the completion of complex forms.

Work towards specific performance targets, which include 8-10 calls on advice line per day, or 4 Face to Face appointments.

- Work collaboratively with other colleagues involved in the advice work process.
- Maintain confidentiality about clients and their contact.
- Consult the Advice Session Supervisor appropriately.
- Work within agreed CARD systems and procedures.
- Maintain an accurate record of advice provided on Casebook.
- Liaise with other teams regarding support for individual clients.

Research and campaigns

- Assist with Research & Campaigns work by providing information about clients' circumstances through the appropriate channel.
- Participate in generalist advice related campaigns and where appropriate
- Keep up to date with the Research and Campaigns issues and ensure R&C work is promoted and integrated in a way relevant to the role.
- Support the R&C team on any campaigns the team is working on
- Support Research and Campaigns lead by identifying growing advice trends

Professional development

- Keep up to date with legislation, policies and procedures and undertake appropriate training
- Read relevant publications
- Attend relevant internal and external meetings to contribute on improving service delivery and achieving collective targets.
- Undergo relevant training as identified with your line manager
- Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate

Administration

- Use of telephony and IT equipment for multichannel delivery of advice services
- Use of IT software for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production.
- Ensure GDPR compliant training is completed on an annual basis
- Ensure that all work conforms to the organisation's systems and procedures

Other duties and responsibilities

- Work within agreed CARD systems and procedures
- Abide by health and safety guidelines and share responsibility for your own safety and that of colleagues.
- Any other relevant advice and support duties required to ensure the smooth running of the service.
- Demonstrate commitment to the aims and policies of the Citizens Advice service.
- Help set a positive and supportive environment by displaying our behaviours of being responsible, inventive and generous.
- Develop and maintain effective administrative systems and records relevant to the role.
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.
- Undertake such other duties and tasks as may lie within the scope of this post to ensure the effective delivery and development of the service.

Generalist Adviser Person Specification

1. At least 12 months recent experience of delivering high quality digital support or advice in a busy call centre / digital environment/outreach whilst maintaining quality standards.
2. Ability to adapt to client needs by adapting your own approach to support clients accessing us via multiple channels including telephone, face to face and digital platforms.
3. Ability to work unsupervised at various outreach settings with an understanding of information assurance and safety in those settings.
4. Ability to research difficult advice issues within reputable sources and convey complex information to the client, ensuring that they have understood.
5. Excellent written and verbal communication skills.
6. Ability to understand and assimilate complex information.
7. Be competent and confident in the use of Google IT systems, Zoom, intranets, email and case management systems.
8. Experience of working to performance targets in a fast paced environment.
9. Excellent customer service skills with a non-judgemental approach.
10. Ability to write detailed and quality case notes.
11. Ability to type and talk.
12. Ability to work under pressure and deliver quality on time.
13. Ability to work on your own unsupervised and as part of a team.
14. Understanding of and commitment to the aims and principles of the Citizens Advice service and our values.

Due to the nature of the role which involves providing advice at various outreach settings across Rotherham, access to own transport and full driving license is desirable.



What we give our staff

- 30 days annual leave plus bank holidays (with the option to buy or sell up to 5 days - terms and conditions apply)
- We believe that the invaluable work we do comes from looking after our staff and volunteers so that they in turn have the energy and passion to do the best possible job for our clients.
- We offer a supportive environment where our people feel valued and enjoy plenty of opportunities for professional development within our service.
- You will join a service committed to its values of being Generous, Responsible and Innovative, with a commitment to making a difference to the lives of our community.



3 things you should know about us

1. **We're local and we're national.** The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members across England and Wales. Citizens Advice Rotherham and District is part of the network of local Citizens Advice members and offers free, confidential advice to everyone locally as well as over the phone to clients across the country.
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. How the Citizens Advice service works



Our Values

We're innovative. We're not afraid of trying new things and learning from things we get 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're open and honest and we 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.

Why work for Citizens Advice Rotherham?

Rotherham Borough has dealt with some challenging times over the past 10 years, but Rotherham Metropolitan Borough Council (RMBC) has turned a lot of the negatives into positives and as a consequence of some great leadership there is a real drive for change. The Rotherham Plan is in place and there are now huge investments being made by the council in the town centre and outlying areas. We are seeing more new businesses moving into the area, creating new jobs and training opportunities for local people. The cost of housing is low, compared to national averages, making Rotherham an affordable place to live and work.

Founded in 1969 Citizens Advice Rotherham is very much at the heart of our community, supporting local people to access free, independent, confidential and impartial advice and working in partnership with statutory and voluntary sector agencies to make a difference across the borough. We have a strong relationship with RMBC, from whom we receive £213,000 per year core funding to provide in person and digital advice, five days per week between 9.30am and 5pm.

Over the last four years we have been on a mission to improve our advice service offer in order to help more people, focusing much of our service development on hard to reach groups and communities. In 2021/22 we supported about 9,986 unique clients, this year we are once again expecting to support over 19,000. This uplift has been achieved from the hard work and dedication of our paid staff and volunteer team, who work together to deliver a great service. As a consequence of the pandemic, and a move to home working, we have also spent time reviewing the client journey and analysing how clients come into contact with us. This has resulted in a move to a digital by default advice service, backed up by in-person advice and outreaches some of which are delivered via video. We have invested in our call centre capacity, creating a virtual call centre, allowing us to join the Single Queue run by the national Adviceline team. This has resulted in a lift of calls answered from 50 per month to 500 and we have set a target of answering all our local demand (1000 calls per month) by March 2024.

Our office of 12 years is currently being redeveloped by the council. In fact they have knocked it down and are using the site as a base for the builders to work from on the redevelopment of the outdoor and indoor markets. In the interim we have been given a temporary home, sadly not big enough to deliver a drop-in service from, and this is where our admin support is based. The plan is that a newly refurbished building will be made available to us, with the expectation that we will be moving into it in January 2025. We are currently designing the internal layout, so that we get to move into an amazing new office fit for a cutting edge advice service of the future.

Financially we are secure, we have reserves of nearly 6 months of turnover and we use this to be innovative and creative in designing and delivering new services. We are not afraid to set a deficit budget in order to invest in our future and deliver a better advice service for our community.

We recognise the importance of our people and invest in their welfare and happiness. As a service we have adopted Generous, Innovative and Responsible as our values and our leadership works hard to demonstrate those values every day. Lockdown has been tough, addressing the impact on our people's mental health has been a big priority. Over the past two years we have introduced a range of ideas to bring us all together, have fun, get to know each other and create that great team spirit we enjoyed when we all worked together in one building. We have achieved this with our 9am briefing, a 20 minute get together on Zoom, where we facilitate 121 and group chats, share news and success stories, as well as other wellbeing activities.

Before lockdown we ran numerous events eg: we took all our people for a fun awayday to South Yorkshire Wildlife Park in the summer of 2023, we had a bring your dog to work week and we celebrated our success by having a week of lunches, where every day of that week we provided all our people with a free lunch which we ate together.



Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 260 local Citizens Advice members.

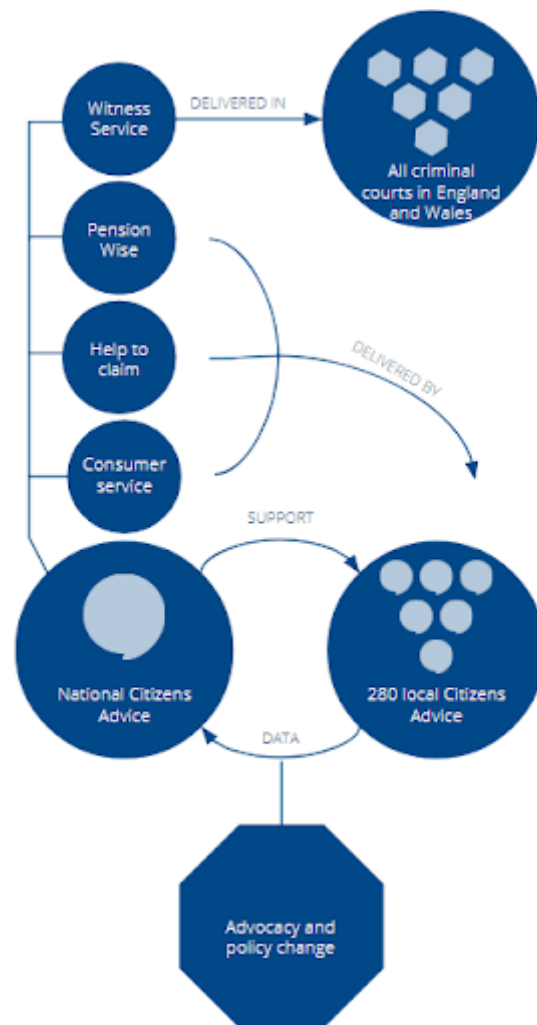
This role sits our network of independent charities, delivering services from

- 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.



Once you have read and understood all of the above information in Section 1, please move onto Section 2 and 3 to apply for this position, completing the required Google forms where prompted.

Section 2: Application form

Guidance notes for applicants

The application form plays a key part in our recruitment and selection process. We use the information you provide about your skills, experience and career to decide whether or not to invite you for an interview. It is important that you complete the application form as fully and accurately as possible, address each of the points on the person spec, ensuring that you give specific examples which demonstrate how you meet the essential and desirable criteria for the role for which you are applying.

Disability

Please let us know if you require any adjustments to be made to the application process or would like to provide any information you wish us to take into account when we are considering your application. If you are selected for an interview, we will ask you to let us know if you have any access needs or may require reasonable adjustments to the interview or assessment (if applicable) at that stage. Please be assured that we will be supportive in discussing reasonable adjustments with you at any stage of the recruitment and selection process.

Entitlement to work in the UK

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 1996. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made.

Please note that Citizens Advice Rotherham & District does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

Diversity Monitoring

Citizens Advice Rotherham & District values diversity and promotes equality. We encourage and welcome applications from suitably skilled candidates from all backgrounds. Monitoring recruitment and selection procedures is one way of helping us to ensure that there is no unfair discrimination in the way that we recruit people. To do this we need to know about the diversity profile of people who apply for posts at Citizens Advice Rotherham & District. This information is given in confidence for monitoring purposes only and is not seen by anyone responsible for making recruitment decisions. However, if you would prefer not to answer any of the questions we ask, please leave them blank.

Information, experience, knowledge, skills and abilities

This is a key section (section 2) of the application form which allows you to provide evidence of your experience, knowledge, skills and abilities that are relevant to the role as described in the role profile. Selection is based on an assessment of the evidence you provide against the requirements of the role as set out in the person specification. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities.

Please provide a minimum of one example for each requirement. You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it and the outcome or result of your actions. Please try to limit your response to each criterion to a maximum of 300 words.

A useful guide might be S.T.A.R:

Specific – give a specific example

Task – briefly describe the task/objective/problem

Action – tell us what you did

Results – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family or home responsibilities, can also be given.

Shortlisting outcomes

Shortlisted applicants will be invited for an interview. Some positions may require additional assessments (practical task/test or assessment centre). If this is the case, further details will be provided if you are shortlisted.

References

All job offers are subject to the receipt of two satisfactory references: One should be from your current or most recent employer or line manager (if you are employed through an agency), or your course tutor if you have just left full time education. The other should be someone who knows you in a work related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the role. References will only be taken up for successful candidates following the interview.

Criminal convictions

Anyone who applies to work within Citizens Advice Rotherham & District will be asked to disclose details of unspent convictions during the recruitment process.

Having a criminal record will not necessarily bar you from working for Citizens Advice Rotherham & District – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, we are not able to employ anyone with a conviction for a sexual offence against a child or vulnerable adult, regardless of when the offence took place. All other convictions will be considered on an individual basis.

Disclosure and Barring Service (DBS) disclosures are only requested where proportionate and relevant to the post concerned. If the post for which you are applying for requires a DBS disclosure, this will be discussed at interview.

Application Pack

Please complete [Generalist Advisor Application pack](#) (Google Form)

If you have any issues completing the above form, please let us know at careers@citizensadvicerotherham.org.uk

Once submitted please move on to Section 3: Equality, Diversity and Inclusion and complete the Diversity monitoring form

Section 3: Equality, Diversity and Inclusion

Equality, Diversity and Inclusion

Citizens Advice is fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us. We accept that equal treatment of people from discriminated against groups is insufficient to achieve equal opportunities and that positive action is also required. The service is therefore committed to positive action as a means of removing barriers to services and employment opportunities for those from discriminated against groups.

To help us achieve this, we aim to make our recruitment process as fair as it can be:

- **We judge the application, not the person.** Your application will be scored solely on your answers to the person specification section. This makes sure each person's response is judged on its merits and not on their background.
- **We will meet any reasonable adjustment requests.** Please let us know if you need us to adapt our application process so there are no barriers for you to apply.

As part of our commitment to Equity, Diversity and Inclusion, Citizens Advice Rotherham & District encourage our staff to engage with National Citizens Advice network and support groups, such as:

- REACH – for all Black, Asian and racially minoritised people within the service
- Disability
- LGBTQ+
- Trans and Non-Binary
- Autism Spectrum and Neurodiversity

These are safe spaces for individuals to have a voice, raise concerns, seek support from others, and act as a critical friend to the wider organisation.

Ex-offender policy

Citizens Advice Rotherham & District is committed to the promotion and delivery of equal opportunities to clients and to volunteers and paid staff. We welcome applications from any part of our community, including from people with criminal records. Having a criminal record will not necessarily bar you from working for Citizens Advice Rotherham & District – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, we are not able to employ anyone with a conviction for a sexual offence

against a child or vulnerable adult, regardless of when the offence took place. All other convictions will be considered on an individual basis.

Anyone who applies to work or volunteer within Citizens Advice Rotherham & District will be asked to disclose details of unspent convictions during the recruitment process. This information will not be shared with the interview panel and will only be discussed in more detail if you are the successful candidate. Candidates must not withhold information about unspent convictions and failure to reveal information that is directly relevant to the position could lead to a withdrawal of an offer of employment or volunteering opportunity.

We undertake not to discriminate unfairly against volunteers or paid staff who voluntarily reveal that they have a criminal conviction. Equally, we will not discriminate unfairly against volunteers or paid staff where a DBS check reveals a criminal conviction or other information about offences. We will ensure that an open and measured discussion will take place on the subject of any offences or other matters that might be relevant to the position.

Diversity monitoring form

CONFIDENTIAL APPLICATION FORM - Diversity monitoring

Please complete [CARD Confidential Diversity Monitoring Form](#) (Google Form)

If you have any issues completing the above form, please let us know at careers@citizensadvicerotherham.org.uk

Please note this section will be detached before sending your application to the recruitment panel for shortlisting.

Once you have submitted both forms in section 2 & 3, your application is complete. If you require any further support or need to provide us with any additional information - you can contact us at careers@citizensadvicerotherham.org.uk

We will contact you on or after the closing date to notify you if you have been shortlisted for interview for this position