

Recruitment Pack

Job title: Generalist Telephone Adviser

Hours:

Contract:

Salary:

Reporting to: Advice Services Manager (Telephony)

Line manages: N/A

Location: Leamington Office - Hamilton Terrace,
Leamington Spa CV32 4LY

Closing date:

Interview date:

Introduction from Julie Robinson, Chief Executive

Thank you for taking the time to consider applying for a job at Citizens Advice South Warwickshire. As part of a national network of Citizens Advice offices, we work to make society fairer by helping our clients find a way forward whatever individual problems they may be facing. We do this through our core advice services available by telephone and email, and through all of our projects which are funded by a range of local funders. We also help to champion change at a local and national government level through our research and campaigning work.

The last few years have seen a massive change in how we deliver our vital services to the people in South Warwickshire. We have invested in our telephone Adviceline with our partners in BRANCAB and North Warwickshire, thanks to funding from Warwickshire County Council and the National Lottery, and now take many calls directly from the public - over 1000 a month! This means we can often meet advice needs over the phone, freeing up vital face-to-face services at our drop-in services in Leamington Spa, Stratford District Council offices, and through our outreach locations. We have recruited more volunteers, and can train and support them efficiently to deliver on the telephone and then face-to-face, which is a cornerstone of the Citizens Advice model. We are committed to ensuring our services are accessible and open to everyone who needs us. More and more people are facing hardship, whether that be through the current unprecedented cost of living crisis, unemployment issues, debt and benefit challenges, housing and food and fuel poverty.

Our services are now in more demand than ever. Consequently, we are looking for people who are committed to thinking creatively about how we deliver our services now, and ways in which we can do things differently. We keep our clients at the centre of our work, and you would be joining a team of highly motivated and professional advice workers dedicated to making a tangible difference to the people in South Warwickshire.

About Citizens Advice South Warwickshire

We are an innovative community-based organisation, focused on meeting the needs of the people we serve across the South Warwickshire area. This includes the larger towns of Warwick, Kenilworth, Leamington Spa, and Stratford Upon Avon, as

well as the villages surrounding these towns. We have been able to demonstrate our excellence across our advice channels through the yearly inspection process from National Citizens Advice and our Advice Quality Standards across all advice areas (AQS).

Our People

Citizens Advice South Warwickshire has a Trustee Board of people who are all volunteers. Our Trustees bring a wide range of professional skills and knowledge and insight into the district to the planning of the service. The Trustees, in conjunction with the CEO, are ultimately responsible for setting the strategy and budget for the service. Day-to-day running and further development of the organisation is the responsibility of the CEO who, alongside the Operations Manager, Targeted Services Manager, Telephony Manager, and our Quality Compliance and Service Delivery Manager, oversee the delivery of our services.

CASW has 29 FTE paid staff members and is proud to have over 58 volunteers working in various roles, with more joining our training programs all the time. These roles include reception and administration, generalist advice, supervisors, money advice, research and campaigns work, financial capability, money mentors, IT support, and more. These volunteer roles have expanded in recent years and the service is actively developing volunteers to support its offer.

CASW operates from two main locations; Hamilton Terrace, Leamington Spa, and Stratford District Council offices (Elizabeth House), in Stratford-upon-Avon. The office in Leamington is used as our Advice Line Telephony Hub, and an admin, meeting, and training base currently and we are actively seeking community venues to deliver advice face-to-face to vulnerable clients. Anyone joining us can expect a flexible working base, with a degree of home working based on the needs of the business and the role.

Our Clients

On many indices of deprivation, South Warwickshire can be defined as a low-need / high-income area. This masks significant pockets of deprivation, rural challenges of isolation, access to services and work, significant fuel poverty, and affordability, especially in relation to housing.

The difference we make

We make an amazing difference in the lives of the people of South Warwickshire. What we do is often life-changing and sometimes life-saving. In 2024-25 we

delivered our advice and advocacy to 8,682 clients and advised on 39,361 issues.

Our funding and projects

We have a wide range of funding sources. This includes income from Warwickshire County Council, Warwick and Stratford District Councils, and a number of town and parish councils. This income is awarded via direct grants and through commissioned contracts. We have also been very successful at drawing down further income from grant and project funding bodies including the Big Lottery Fund, Henry Smith Trust, Oken Trust, Orbit Housing, Money Advice Service, and many more.

Our local Research and Campaigns (R&C)

The stories our clients tell us provide us with a unique insight into the problems faced by people living in South Warwickshire. We are able to spot developing trends and this helps us to create campaigns and speak up for our clients to those in decision-making roles. By raising issues nationally we can create a public debate, change things for the better, and help many more people than those that contact us.

More on our projects and areas of work can be found on our website:
<https://www.casouthwarwickshire.org.uk>

The very best of luck with your application.

Our Values:

Our Values are integral to how we work here in South Warwickshire, both in terms of our interactions with one another, and the work we do for clients. Launched in 2024, these Values were designed in collaboration with staff and volunteers, and are regularly kept under review. Adherence to, and demonstration of, our Values will form part of your ongoing employment with Citizens Advice South Warwickshire.



Job Description & Person Specification

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Overall Purpose of the Role

We are seeking candidates with good customer service experience and a Generalist Certificate in Advice or equivalent demonstrable experience, to provide high quality information and advice to clients over the telephone on a wide range of subjects. Opening hours for telephone advice will be 9am - 3.30pm with extra time for writing up case notes.

Responsibilities:

Advice giving

- Answer Adviceline calls on a daily basis, reacting to demand on the telephone from the south Warwickshire area and ensuring a streamlined responsive telephone service for people in need.
- Interview 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.
- Use the Citizens Advice AdviserNet website to find, interpret and communicate the relevant information and advice.
- Research and explore options and implications so that clients can make informed decisions.
- Where required identify further advice and support and make appropriate referrals internally and externally.
- Ensure that all work conforms to the organisation's office manual and the

Advice Quality standard and other funding requirements, as appropriate.

- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.
- Maintain detailed case records for the purpose of continuity, information retrieval, statistical monitoring and report preparation.
- Read and respond to emails and webchat requesting advice as needed.

Research and Campaigns

- Assist with research and campaigns work by providing information as appropriate.
- Alert clients to research and campaign options.
- Keep up to date with legislation, policies and procedures and undertake appropriate training.

Administration

- Attend relevant internal and external meetings as agreed with line manager.
- Prepare for and attend supervisor sessions/team meetings/staff meetings as appropriate.
- Use IT for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production.
- Ensure all work conforms to the organisation's systems and procedures.
- Ensure that at all times, we act within our values and behaviours to ensure a dynamic and 'one team' approach to our work supporting clients and colleagues.

Other

- Complete required training and induction processes to comply with quality assurance within the time frame agreed with the line manager. This time frame will be tailored to the skills and expertise you bring to the role.
- Carry out any task that may be within the scope of the post to ensure the effective delivery and development of the service.

This job description is not exhaustive or exclusive. It is intended as an outline of the areas of activity and will be amended in light of the changing needs of the organisation and the funding we have in place to deliver the service.

PERSON SPECIFICATION

	CRITERIA	ESSENTIAL/ DESIRABLE
1	Demonstrable experience in supporting people on the telephone with excellent customer focused listening and problem solving skills	ESSENTIAL
2	Proven ability to research, interpret and present complex information and produce accurate and literate case records	ESSENTIAL
3	Be competent and confident in the use of IT systems, Google suit, Zoom, intranets, email etc	ESSENTIAL
4	Flexibility and the willingness to work occasionally outside of office hours	ESSENTIAL
5	Knowledge and experience of delivering advice in any of the following enquiry areas: debt, benefits, housing, employment, family, legal, consumer, health and social care and immigration.	ESSENTIAL
6	At least 6 months recent experience of delivering high quality advice whilst maintaining quality standards.	ESSENTIAL
7	Completed the Generalist Certificate in Advice or equivalent qualification or experience	ESSENTIAL