

Candidate information pack

Trainee Generalist

Caseworker

We must
keep on protecting
each other.



HANDS



FACE



SPACE

**citizens
advice**

Stevenage

cyngor ar bopeth
citizens advice
cyngor ar bopeth

citizens
advice

Thanks for your interest in working at Citizens Advice Stevenage.

This job pack should give you everything you need to know to apply for this role and what it means to work for us

In this pack you'll find:

- Information about organisation
- Purpose of the job
- Job description and person specification
- Interview and Application Process
- Candidate guidance notes

Want to chat about this role?

If you want to chat about the role further, you can contact Charlie by emailing recruitment@castevenage.org.uk





We help people find a way forward

We can all face problems that seem complicated or intimidating. At Citizens Advice we believe no one should have to face these problems without good quality, independent advice.

That's why we're here: to give people the knowledge and the confidence they need to find their way forward - whoever they are, and whatever their problem.

3 things you should know about us

1. We're local and we're national. Citizens Advice is a Network made up of 4 national offices and 265 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.

Trainee Generalist Caseworker

Reporting to: Head of Advice

Department: Advice Services

Hours: Full time – 37.5 hours
per week

Salary: £23,809.50 - £24,999.98
dependant on experience

Holidays:
27 plus bank holidays

Location: Office in Stevenage.
Hybrid working by arrangement

Contract: Fixed term until 1st
December 2026

Purpose of the Job

Working within the aims, policies and principles of the Citizens Advice Service, to support clients with a range of issues; providing information, advice and casework support in person, via telephone, video calling and email.

The successful candidate will complete necessary training in order to provide holistic information, advice and casework on a range of issues, including but not limited to: housing, welfare benefits, debt, employment, family, law & courts and consumer.

Job Description

Advice & Casework

- Interview clients using sensitive listening and questioning skills, supporting them to explain their problem(s) and identify their priorities.
- Use Citizens Advice resources to research and communicate relevant and accurate information.
- Provide initial information and advice across all main enquiry areas, progressing towards more in-depth casework as skills and confidence grow.
- Work with clients to explore available options and help them make informed decisions.
- Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning, or by supporting with grant applications.
- As training progresses, develop the ability to ensure income maximisation through the take up appropriate welfare benefits.
- As training progresses, develop the ability to support clients with homelessness prevention and housing issues such as disrepair or landlord disputes. Where necessary, provide a help desk service at the local court during housing repossession hearings: advising and advocating as necessary on behalf of those facing repossession of their home.
- Receive training to deliver financial capability advice and contribute to debt prevention work.
- Work towards being able to prepare and present cases to appropriate third parties, such as statutory bodies or tribunals, under supervision.
- As training progresses, develop the ability to support the family project, working under supervision to provide information and advice to clients facing relationship breakdowns.
- Learn to negotiate with third parties on clients' behalf, with support and guidance.
- Ensure all work complies with Citizens Advice policies, the Advice Quality Standard, and internal quality assurance processes.
- Maintain accurate case records to ensure continuity, statistical reporting, and effective service delivery.

Research & Campaigns

- Support the service's research and campaigns work by identifying and recording social policy issues observed in client cases.
- Participate in research and campaign activities as appropriate, with guidance from supervisors.
- Alert clients to research and campaign options.
- Provide anonymised case examples when requested.

Administration

- Use Citizens Advice systems and IT tools for case recording, document production, and data entry.
- Follow agreed administrative procedures and maintain confidentiality at all times.

Public Relations

- With support, develop professional relationships with relevant external agencies.
- Represent the organisation appropriately and positively in dealings with external bodies, both statutory and non-statutory organisations.

Training & Professional Development

- Successfully complete the Citizens Advice Adviser Learning Programme, including Generalist Training.
- Successfully complete Debt Training to Advice Level, followed by Specialist Debt Training to Casework and Court Representation level.
- Undertake further learning to gain competency in housing and family casework, including training on court representation where appropriate.
- Participate in regular learning and development activities, including workshops, team training sessions, and e-learning modules.
- Keep up to date with relevant legislation, policies, and procedures, with support from the supervisor and learning resources.
- Take responsibility for identifying personal learning needs and engage actively with development opportunities.

Other Duties / Responsibilities

- Make home or outreach visits when necessary, under supervision and once appropriate training has been given.
- Carry out any other reasonable tasks in line with the purpose and level of the role.
- Uphold and promote the aims and values of the Citizens Advice service.
- Abide by health and safety policies and take personal responsibility for maintaining a safe working environment.

Person Specification | What you need to do this job

Essential:

- Ability to communicate clearly and effectively both orally and in writing, including the ability to give and receive information accurately and in a manner appropriate to the audience.
- Organisational skills, with the ability to manage a workload and prioritise tasks, working to deadlines using own initiative. An ability and willingness to follow and develop agreed procedures.
- Ability to build positive working relationships with clients, colleagues, and external agencies.
- A commitment to continuous learning and personal development.
- Ability to research, analyse and interpret information and present findings clearly.
- Ability to manage time effectively, plan workload, meet deadlines, and maintain high standards under pressure.
- A commitment to the aims, principles, and values of the Citizens Advice service, including its equality and diversity policies.
- Good IT skills, including the ability to use email, the internet, and case management systems.
- Writing skills with particular emphasis on recording case notes, summarising advice to clients and corresponding with third parties on the behalf of our clients.
- Numeracy skills, with the ability to learn how to carry out calculations for clients and prepare budgets, and to understand statistics and check accuracy of calculations
- Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.

- Willingness to undertake training and development, including successful completion of the Citizens Advice Adviser Learning Programme.

Desirable:

- Understanding of the issues affecting clients in areas such as debt, benefits, housing, employment and immigration.
- Experience of working or volunteering in a customer service, advice, support, or advocacy setting (including unpaid experience).
- Understanding of or interest in social justice, anti-poverty work, or rights-based services.
- Knowledge of local services and organisations, or an interest in developing this.

Application Process:

To apply, please send your CV and a supporting statement addressing each point in the person specification, in the order listed. Use examples and evidence to demonstrate how you meet the criteria.

Submit your application to recruitment@castevenage.org.uk

Incomplete applications may not be considered.

We are an equal opportunity employer. If you have any requirements (e.g. for attending an interview) please note these clearly on in your letter.

Interview Process:

The closing date is **Friday 31st October 2025** at **midnight**.

Shortlisted candidates will be contacted by telephone, so please give a daytime telephone number or somewhere we can leave a message to arrange an interview.

Selection Process

- **Stage 1: In-Person Interview** – Held at our office in Stevenage on Thursday 13th November 2025.
- **Stage 2: Practical Task & Final Q&A** – If successful at Stage 1, you'll be invited to complete a short task and attend a follow-up Q&A on the same day. You'll be informed at the end of Stage 1 if you are progressing.

Guidance notes for applicants

Equal Opportunities

We are an equal opportunity employer. Please let us know if you require any adjustments to be made to the application process or if you have any requirements (e.g. for attending an interview). Note these clearly on in your letter. 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 Stevenage does not hold a sponsor license and, therefore, cannot issue certificates of sponsorship under the points-based system.

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. Both referees should be able to comment on your suitability for the role. References will only be taken up for successful candidates following interview.

Criminal convictions

Anyone who applies to work within Citizens Advice Stevenage 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 Stevenage – 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 noted in the application pack.

Health and Safety

It will be the duty of every employee while at work to take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts or omissions at work.

The duties and responsibilities listed above describe the post as it is at present. The post holder is expected to accept any reasonable alterations that may from time to time be necessary.

Addressing each point of the person specification

This is a key section of the application 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 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 200 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.





www.castevenage.org.uk

Candidate Briefing Pack

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Company number 03836105

