i-access Generalist Adviser
Job pack

Thank you for your interest in working at Citizens Advice Woking.

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.

- Our Purpose
- Three things you should know about us
- About Citizens Advice Woking
- The role profile and personal specification
- How to apply

We are looking for a highly motivated person to join our specialist team, who has recent experience of advising clients. You will need to demonstrate that you can cope with a demanding caseload and that you are able to monitor and manage your own caseload to meet deadlines. The successful candidate will be required to provide advice and assist clients with issues including benefits, housing and debt advice.

Our purpose

We exist to shape a society where people face far fewer problems. Our national charity and network of local charities are united by this common purpose.

We're driven by our ambition to make things better for people, individually and collectively. We're driven by the power of good advice, to help people solve their problems. And we're driven to change the underlying causes of problems, through our research and campaigns work with governments and other organisations.

3 things you should know about us

- We're local and we're national. The national charity has 4 administrative offices in England and Wales supporting the work, delivered by around 240 independent local Citizens Advice member charities.

- 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.

- 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.

About Citizens Advice Woking

Citizens Advice Woking (CAW) is an independent local charity and a company limited by guarantee. We provide free, confidential, impartial, independent advice for the benefit of the local community, to exercise a responsible influence on the development of social welfare policies and to ensure individuals do not suffer through lack of knowledge or an inability to express their needs effectively.

CAW provides services in the following locations:

- Woking Town Centre (Provincial House, 26 Commercial Way, Woking GU21 6EN)
    - Telephone advice service via Surrey Adviceline: Monday to Friday, 10am to 4pm
    - Drop-in sessions for initial assessments: Tuesday to Thursday, 10am to 1pm
    - Advice appointments: Monday to Friday, 10am to 4pm
    - Specialist caseworker appointments, by arrangement: Monday to Friday, 10am to 4pm

- The Byfleet Methodist Church, Rectory Lane, Byfleet, KT14 7LL
    - Funded by United Byfleet Charity
    - Drop-in sessions
      for initial assessments: Wednesday, 12pm to 2.30pm

- Ukrainian Hub, Provincial House, 26 Commercial Way, Woking, GU21 6EN
    - Funded by Woking Borough Council
    - Drop-in sessions for initial assessments, for the Ukrainian community: Tuesday, 10:30am to 2:30pm

- The Mascot Hub, Sheerwater Nursery Building, Blackmore Crescent, Sheerwater GU21 5NZ
    - Drop-in sessions for initial assessments: Thursday, 10am to 12pm

We also run the following Projects on behalf of different funders:

- I Access Community Drug and Alcohol Service: Funding from Surrey and Borders NHS Trust to provide a generalist adviser to advise on all enquiry areas.

- Trussell Trust Foodbank: Funding to provide a generalist adviser at the Foodbank.

- Refugee Support Funding from Woking Borough Council to provide welfare benefit advice to support the Syrian and Refugee community and to provide generalist advice to the wider refugee community.

Governed by a Board of 9 trustees, we have a highly skilled workforce to support the organisation. This includes 14 paid staff, and more than 50 volunteers.

Our generalist advice service is provided by volunteers who carry out reception and administrative duties, give information and advice and have research and campaign roles and are managed and supported by paid staff. We also have paid caseworkers in the areas of welfare benefits and housing.

Woking is often considered to be an affluent area with high levels of employment and rates of home ownership, however there are significant pockets of deprivation across the borough and our priority is to support the most vulnerable in our community. The main enquiry areas of welfare benefits, debt and housing continue to be the issues that most of our clients need help with.

The role

This is a joint venture between Citizens Advice Woking (CAW) and i-access, the drug and alcohol community service which offers specialist assessment, support, and treatment to people in Surrey who want help with their drug and/or alcohol use.

Working with i-access service users, either remotely or in person, the role is to provide information, advice, and casework in all areas of generalist advice, but particularly in the areas of welfare benefits, debt, and housing.

Service users will be referred by i-access staff to the Generalist Adviser (GA) to receive the support and advice they need to deal with the problems they are facing. This will be delivered by telephone, digital, virtual or face to face channels. The GA will be expected to thoroughly explore the service user's situation, carry out the appropriate research, provide the service user with the appropriate options and where necessary to support the service user to move forward and stabilise their position.

Liaison with i-access staff is essential prior, during and after the GA's contact with the service user. This will be both verbal and written communication and the ability to provide written reports and keep data will be an essential part of the role.

The GA will be part of the team at CA Woking and will need to know what support and additional services can be provided by the paid team of caseworkers at CAW but also at the local Citizens Advice office closest to the service users home address in the event a referral is needed.

The GA will need to travel to the three i-access locations in Guildford, Redhill, and Chertsey as well as to CAW's office main office. The GA will also need the ability to work remotely from their home, which will require a confidential work space and reliable Wi-Fi.

Role profile

Advice giving

- Interview clients using sensitive listening and questioning skills to allow service users to explain their problem(s) and empower them to set their own priorities.
- Use the Citizens Advice Advisernet website to research, interpret and communicate the relevant information.
- Research and explore options and implications so that service users can make informed decisions.
- Act for the service user where necessary by calculating, negotiating, drafting or writing letters and telephoning third parties.
- Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
- Ensure that all work conforms to 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 of casework, information retrieval, statistical monitoring, and report preparation.

Research and Campaigns

- Assist with research and campaigns work by providing information as appropriate.
- Alert clients to research and campaign options.
- Professional Development, 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 team meetings and 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.

Other

- Complete required training to comply with quality assurance processes.
- Carry out any task that may be within the scope of the post to ensure the effective delivery and development of the service.

Person specification

Essential Criteria

1. Ability to commit and work within the aims, principles, and policies of the Citizens Advice service.

2. Proven understanding of equality and diversity and its application to the provision of advice.

3. Proven ability to interview clients using sensitive listening and questioning skills to get to the root of issues and empower clients, whilst maintaining structure and control of meetings.

4. Understanding of the issues affecting society and their implications for the client and service provision.

5. Proven ability to research, analyse and interpret complex information, produce, and present clear reports verbally and in writing.

6. Ability to understand statistics and check accuracy of calculations.

7. Excellent organisational skills and the ability to prioritise and manage a range of tasks and conflicting demands.

8. Ability to work on your own initiative and monitor and maintain your own standards.

9. Proven ability to prioritise own work and the work of others, meet deadlines and manage the workload of a busy environment.

10. Proven ability to use IT systems and packages, and electronic resources in the course of your work to record information and produce written documents.

11. A commitment to continuous professional development, including a willingness to develop knowledge and skills to carry out the role.

Desirable Criteria

1. Knowledge and experience of benefits advice.

2. Experience of working sensitively with clients with mental health issues.

In accordance with Citizens Advice national policy, we may require the successful candidate to be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.

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 under represented in our workforce.

Terms of Appointment

Job Title:	i-access Generalist Adviser
Location:	Citizens Advice Woking
Hours:	22.5 per week, 3 days.
Salary:	£28,080 - £31,200 (FTE) per annum, dependent on experience
Actual salary:	16,848 – 18,720 per annum, dependent on experience
Holiday:	25 days annual leave (FTE) plus public holidays
Contract term:	Fixed term until March 2027 with possibility of extension

Please note that applicants must have the legal right to work in the UK. Unfortunately, we are unable to offer visa sponsorship.

Please note that this role is not a qualifying work experience (QWE) position for the purposes of the Solicitors Qualifying Examination (SQE).

How to apply

To apply for the role of i-access generalist caseworker, please send us your CV and a maximum 2 page supporting statement.

The supporting statement should demonstrate how you meet the criteria outlined in the person specification and outline why you are interested in becoming a housing caseworker at Citizens Advice Woking.

All applications must be sent to wokingca@gmail.com

Closing date for applications: 5pm on Monday 5th October 2026.

Applications will be reviewed on receipt on a rolling basis, and we reserve the right to close earlier if applications from sufficient suitably qualified candidates have been received.