



Bournemouth
Christchurch
& Poole

Crisis Resilience Fund- Income Maximisation Caseworker Job pack

Thanks for your interest in working at Citizens Advice Bournemouth Christchurch & Poole. 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.

In this pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice BCP
- The role profile and personal specification
- Terms and conditions
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact
Recruitment@citizensadvicebcp.org.uk

To apply for the role, please send your completed application to
recruitment@citizensadvicebcp.org.uk

Closing date for applications: 9am on 10th August 2026

Our values

We're inventive. We're not afraid of trying new things and learn by getting things 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 tell it like it is and 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.

3 things you should know about us

1. We're local and we're national. We have 4 national offices and offer direct support to people in around 230 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.

How Citizens Advice Bournemouth Christchurch & Poole works

Every year thousands of people come to us for advice and help with solving their problems.

We're here for everyone and help with problems like managing debt or household bills, understanding rights at work or housing issues. We also provide specialist services in welfare, benefits and debt.

Our projects include Macmillan Cancer support, Immigration, multiple specialist Benefits and Debt services.

We're an important part of this community, with 4 offices across Bournemouth, Christchurch and Poole, where people need us.

Through our daily interaction with clients, we have a credible understanding of local needs. We use our data and insight to tailor our services, as well as help improve policies and practices locally.

Putting our clients' needs at the heart of decision-making means we also work in partnership, making it easier for clients to access relevant services.

We're also part of the Citizens Advice service. This means we share knowledge and best practice so that people can expect a quality service.

Together we work to fix the underlying causes of people's problems using evidence gathered from across our network. Because of this we save society money.

Last year we helped people with over 41,500 issues through face to face, telephone and webchat.

The role

To provide expert income maximisation advice for those, accessing the Crisis Resilience Fund under the Let's Talk Money programme. The aim is ensure clients can move away from the initial crisis moment and move towards long term sustainable financial security.

This will include identifying new sources of income through general benefit checks, assistance, and support with new applications, while also providing casework support for benefit appeals. You will need an up-to-date knowledge of the welfare benefits system, strong background in the delivery of high-quality advice and comprehensive understanding of all aspects involved in making and maintaining benefits claims including challenging benefits decisions.

Role profile

Casework

- Provide casework covering the full range of welfare benefits advice and assistance.
- Use the benefits calculator to ensure income maximisation through take-up of appropriate benefits.
- Act for the client where necessary by writing letters, emails and telephoning external organisations.
- Negotiate with third parties as appropriate.
- Prepare and present cases to the appropriate statutory bodies such as DWP and Tribunal Service.
- Assist clients with other related enquiries integral to their case and refer to other advisers or specialist agencies as appropriate.
- Provide advice and assistance to CABCP staff across the whole range of benefit issues.
- Maintain case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Ensure that all casework conforms to the Citizens Advice Quality standard and CABCP systems and procedures.

Research & Campaigns

- Assist with social policy work by providing information about clients' circumstances.
- Provide regular statistical reports and information on the number of clients and nature of cases.
- Monitor service provision to ensure that it reaches the widest possible client group.
- Alert other staff to local and national issues.

Professional development

- Keep up to date with legislation, case law, policies and procedures relating to welfare benefits.
- Undertake appropriate training.
- Read relevant publications.
- Attend relevant internal and external meetings as agreed with the line manager.
- Assist with Service initiatives for the improvement of services.

Administration

- Use IT for record keeping, statistical recording, and document production.
- Keep up to date with policies and procedures relevant to the role and undertake appropriate training.
- Maintain close liaison with relevant external agencies.
- Other duties and responsibilities
- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
- Demonstrate commitment to the aims and policies of the CABCP service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.



Person specification

1. Desired working knowledge of Welfare Benefits System and welfare reforms.
2. Desired knowledge/awareness of challenging Welfare Benefits decisions.
3. Effective oral and written communication skills with particular emphasis on negotiating, representing, case recording and reporting.
4. Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
5. Understand the issues involved in interviewing clients.
6. Numerate the level required in the tasks.
7. Ability to prioritise own work, meet deadlines and manage caseload.
8. Ability and willingness to work on own initiative as well as a part of a team.
9. Ability to monitor and maintain own standards.
10. Ability to use IT in the provision of advice.
11. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
12. Demonstrate understanding of social trends and their implications for clients and service provision.
13. Understanding of and commitment to the aims and principles of the CA service and its equal opportunities policies.
14. Ability to assist with producing clear and concise reports both internally and to external stakeholders.

In accordance with Citizens Advice national policy we may ask 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.



Terms and conditions

Salary: Scale 5 to 7 (£24,573.33 to £25,148.03 pro rata)
dependant on experience and previous training

Hours: 30 hours per week (*initially 1 year fixed term contract*)

Holidays: 20 days + Bank Holidays



What we give our staff

We offer ongoing training and support, generous annual leave, access to online health/wellbeing resources, an Employee Assistance Programme and employers pension contribution.