**Drumchapel Citizens Advice Bureau**

**Generalist Adviser/Triage Assessor**

**Job Description & Person Specification**

**Key work areas and tasks as the triage assessor:**

* Provide a triage assessment of need to clients accessing our busy twice weekly drop in service.
* Identify key information about the issue(s) including time limits, key dates and any requirement for urgent advice or action (using the appropriate advice website, scripts and any other diagnostic tools, as necessary).
* Identify and summarise the essence of the client issue in progress.
* Establish what the client wants.
* Assess and agree the appropriate level of service, taking into consideration the client’s ability to take the next step themselves, the complexity of the issue(s) and the Bureau’s resources.
* Refer clients appropriately (both internally and externally) to suit clients’ needs following agreed protocols, including making arrangements and informing clients of what to expect.
* Signpost clients appropriately to suit their needs, following agreed protocols.
* Record information given during the triage service in the Bureau’s case management system (CASTLE).
* Assist in the management and checking of statistical recording for monitoring/reporting to partners and funders.

**Key work areas and tasks as a generalist adviser:**

* 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 Information System to find, interpret and communicate the relevant information.
* Research and explore options and implications so that clients can make informed decisions.
* Act for the client where necessary by calculating, negotiating, drafting or writing letters and telephoning.
* Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
* Refer internally or to other specialist agencies as appropriate.
* Ensure that all work conforms to the bureau's Office Manual and Quality Standards at the appropriate level.
* Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

**Social policy**

* Assist with social policy work by providing information about clients' circumstances through the appropriate channel.

**Professional development**

* Keep up to date with legislation, policies and procedures and undertake appropriate training.
* Read relevant publications.
* Attend relevant internal and external meetings as agreed with the line manager.
* Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate

**Administration**

* Use IT for statistical recording, record keeping and document production.
* Ensure that all work conforms to the bureau's systems and procedures.
* Provide statistical information on the number of clients and nature of cases.

**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 CAB service.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
* Ensure accurate information and advice is given, by monitoring client records and through case checking.

**Person specification**

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|  | **ESSENTIAL** | **DESIRABLE** |
| **Experience** | * A minimum of at least 1 year experience in working in the CAB service. * Experience in giving advice on a range of subjects to members of the public covering Money, Housing, Social Security, Employment and Legal advice. * Experience providing an advice triage assessment to clients accessing drop in clinics within a very tight schedule. * A working knowledge of the procedures of the citizens advice * Certificate of Money advice Service Quality framework(GGDA) to minimum of Advice level or equivalent | * Writing formal letters and preparing reports, plans and proposals * Specialist experience in core CAB advice subjects |
| **Skills and attributes** | * Ability to communicate and establish good relationships with a range of people * Ability to work without close supervision, prioritise own work and meet deadlines * Ability to deal with difficult situations in a calm, effective non-confrontational manner * Ability to communicate effectively, both orally and in writing * Ability to network with other groups within the community * Ability to gather and accurately record statistics * Excellent organisational skills * Ability to work under pressure | * Ability to work as part of a team and on own initiative * Understanding of the needs of people who may be vulnerable, distressed or under stress * Ability to produce statistical and written reports to funders * Ability to look at the development of services and implement improvements with minimal input |
| **Knowledge** | * An understanding of Castle case recording systems and procedures * An understanding of the needs of the funders relating to clients, client profiles, recording of cases and financial gain. | * Knowledge of local voluntary organisations |
| **Values and attitudes** | * An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of the Bureau. | An understanding of the need for partnership working and a proactive approach to same. |
| **Other** | * A willingness to identify and undertake relevant training * Ability to work flexibly and to travel to a variety of locations within the area | Valid driving licence as some travelling within the bureau operating area may be required. |