

Recruitment pack

Thanks for your interest in working for Citizens Advice Oxfordshire. 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:

- Key facts about what we offer
- Other staff benefits
- Role description
- Person specification
- 3 things you should know about us
- Overview of Citizens Advice
- How Citizens Advice Oxfordshire works
- Our values

Application deadline: 9am, Monday 24 August 2026

Interview dates: Between Friday 4 September - Friday 11 September 2026

Want to chat about this role?

If you want to talk about the role further, you can contact us by emailing staff-recruitment@caox.org.uk

How to apply: The application process can be found on our website at caox.org.uk/apply-paid-role

We are a Disability Confident employer. Should you require any reasonable adjustments to enable you to apply or to attend an interview please let us know. If you have further questions, require any adjustments to be made to the application process, or would like to provide any information you wish us to take into account when we are considering your application, please get in touch by email or phone:

Email: staff-recruitment@caox.org.uk

Phone: 01993 892050



Key Facts

Location: Witney (OX28 6DY)

Other CA Oxfordshire locations (Abingdon, Didcot, Henley, Thame, Oxford) or hybrid can be considered. Occasional travel to Witney for training and meetings will be required.

Hours: Up to 14.8 hours per week (minimum 7.4 hours per week)

Contract: Permanent

Salary: £27,100 - £28,140 FTE (full time is 37 hours)
£10,840 - £11,256 pro rata for 14.8 hours per week

Expenses: Any additional travel above home to work can be claimed at £0.55 per mile

Other: A laptop and any other essential equipment will be provided



Other staff benefits

Workplace Pension

- 5% employer contribution, minimum 3% staff contribution

Generous Holiday allowance

- 31 days plus bank holidays (pro rata for part time roles)

Ongoing training and development opportunities:

Your line manager and our Learning & Development Team will work with you to develop an individual training plan and offer opportunities to develop new skills relevant to your role.

Regular personal supervision and annual appraisal

Employee Assistance Programme:

- Telephone counselling support
- Personal legal and financial information
- Health advice across a range of medical and wellbeing issues
- Access to an online portal for further advice and support
- Speak in confidence to a third party with anonymity assured
- Available 24/7, 365 days a year



Role Description

Context of role:

Cottsway Housing Association have partnered with Citizens Advice Oxfordshire to provide a free information and advice service to all their tenants. Starting as the largest local registered provider of social housing in West Oxfordshire, Cottsway Housing has expanded to provide housing in Gloucestershire, Worcestershire and Wiltshire. The Cottsway Project aims to provide equal access to advice and information to all Cottsway Housing tenants regardless of their location. Tenants have access to a free telephone and digital service, providing triage, signposting, information and advice and casework.

Reporting to the Project Manager, Citizens Advice Oxfordshire are looking for a Triage Adviser to join our team to deliver information, client support through multiple channels remotely including telephone and emails.

We will offer office-based training until full competence has been achieved, after which you may be office based locally, or partially home based. You will deliver client support through multiple channels remotely including telephone and emails.

This project supports Cottsway Tenants by providing a holistic advice service, but with a particular emphasis on helping those who have accumulated or are at risk of accumulating debt, through providing regulated debt advice and support, particularly in preventing homelessness.

We ensure all clients are receiving their full entitlement. This helps people to make the best use of the money available to them and manage any debt, giving them choices and control over their finances, and ultimately enhancing their overall wellbeing.

The service provides:

- An eligibility checks
- Initial diagnosis of issues
- Self-help e.g. access to how to and advice guides, leaflets and internet based advice
- Assisted Information. Clients will be given supported information on how to progress their issue

Cottsway Project Triage Adviser

- Onward referral to locality based advisers or caseworkers for full advice where appropriate, and for face to face, telephone advice or home visits if required.
- Where advice required is in an area outside in the remit of this project callers will be referred to the most appropriate local service.

Role purpose:

As part of the Cottsway Projects Team, you will be the first point of contact on the designated telephone advice line and email service for clients. You will complete an initial triage to ascertain eligibility for the service and where appropriate give limited advice on benefits, debt and other financial and welfare matters.

Referrals will be received via the generic email inbox, in-house referrals and from Cottsway Housing Association, which will also be added to the tasklist for call backs. Clients will then be referred to the Cottsway Project Caseworkers for more complex advice and support.



Role profile

You will work with other specialists both within the service and externally to ensure that the client receives the most appropriate specialist support for different issues where appropriate. All clients referred will be triaged mainly by telephone and all contacts will be listed on a common task list for advisers to action.

Triage and Basic Advice

- Assess the client's problem(s) using sensitive listening and questioning skills.
- Assess and agree the appropriate level of service, taking into consideration the client's eligibility, ability to take the next step themselves, the complexity of the problem and the project resources.
- Identify key information about the issue/s including time limits, key dates and any requirement for urgent advice or action (using the citizensadvice.org website, scripts and any other diagnostic tools, as necessary).
- Explain self-help information and 'How to guides' to clients
- Conduct quick benefit checks, and refer to caseworkers for assistance with full advice, form completion and complex casework as appropriate
- Refer clients appropriately (both internally and externally) to suit client's needs following agreed protocols, including making arrangements and informing clients of what to expect.
- Complete an initial Debt Assessment Tool (DAT) based on each client's circumstances.
- Use the Citizens Advice website and the Citizens Advice Oxfordshire Intranet website to find, interpret and communicate the relevant information.
- Signpost clients appropriately, following agreed protocols.
- Refer to other specialist agencies as appropriate.
- Ensure that work reflects and supports the Citizens Advice service equality and diversity strategy.
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

Research & Campaigns

- Assist with research and campaigns work by providing information about clients' circumstances.
- 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 specified areas and undertaking appropriate training.
- Read relevant publications.
- Attend relevant internal and external meetings as agreed with the line manager.
- Prepare to attend supervision sessions/team meetings/management team meetings as appropriate.
- Assist with Service initiatives for the improvement of services.

Administration

- As part of a wider team, work to achieve the targets set within the contract.
- Provide follow-up calls to collect client satisfaction and outcomes information as required
- Use IT for statistical recording of information relating to social policy and funding requirements, record keeping and document production.
- Keep up to date with policies and procedures relevant to the role and undertake appropriate training.
- Ensure that all work conforms to the Citizens Advice' systems and procedures.
- Attend regular service team meetings and training

Partnerships

- Maintain good and proactive relationships with the partner Trussell Trust food banks and other related agencies and partners.
- Liaise with statutory and non-statutory organisations and represent the Service on outside bodies as appropriate.

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.
- Abide by health and safety guidelines and share responsibility for their own safety and that of colleagues.



Person specification

Essential Criteria

- Ability to commit to and work within the aims, principles and policies of the Citizens Advice service.
- A good, up to date understanding of equality and diversity and its application to the provision of advice.
- Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
- Ability to monitor and maintain own standards.
- Understanding of the main enquiry issues involved in assessing clients' issues.
- Ability to interview clients using sensitive listening and questioning skills to get to the root of the issues and empower clients, whilst maintaining structure and control of meetings.
- Understanding of the issues affecting society and their implications for clients and service provision.
- Ability to use IT systems and packages in the provision of advice, including the ability to input data for record keeping and navigate online information systems.
- Ability and willingness to work as part of a team.
- Ability to work within guidelines, protocols and procedures.
- Ability to manage time effectively
- Effective written and oral communication skills.
- Ability to understand statistics and check accuracy of calculations.
- A commitment to continuing professional development, including a willingness to learn and develop knowledge and skills in main enquiry areas.

Desirable Criteria

- Knowledge of a broad range of advice areas, with a particular emphasis on welfare benefits and debt advice.
- Recent experience of delivering benefits and/or debt advice.

In accordance with Citizens Advice policy, we will 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.

An opportunity to work with a fantastic team of dedicated volunteers and staff. We look forward to meeting you.

3 things you should know about us

1. We're local and we're national. We have 6 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.

Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 280 local Citizens Advice members.

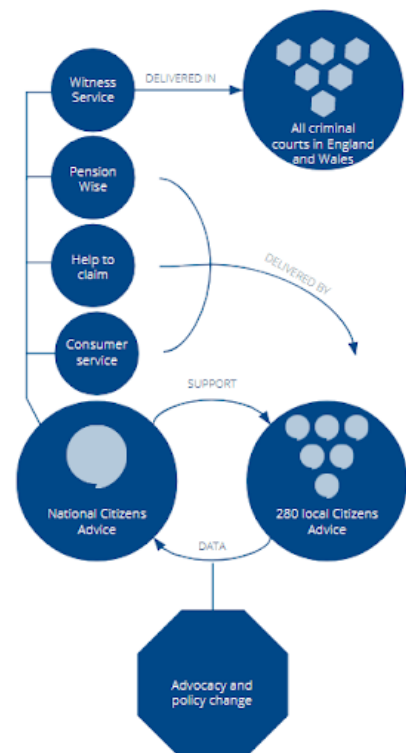
This role sits our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

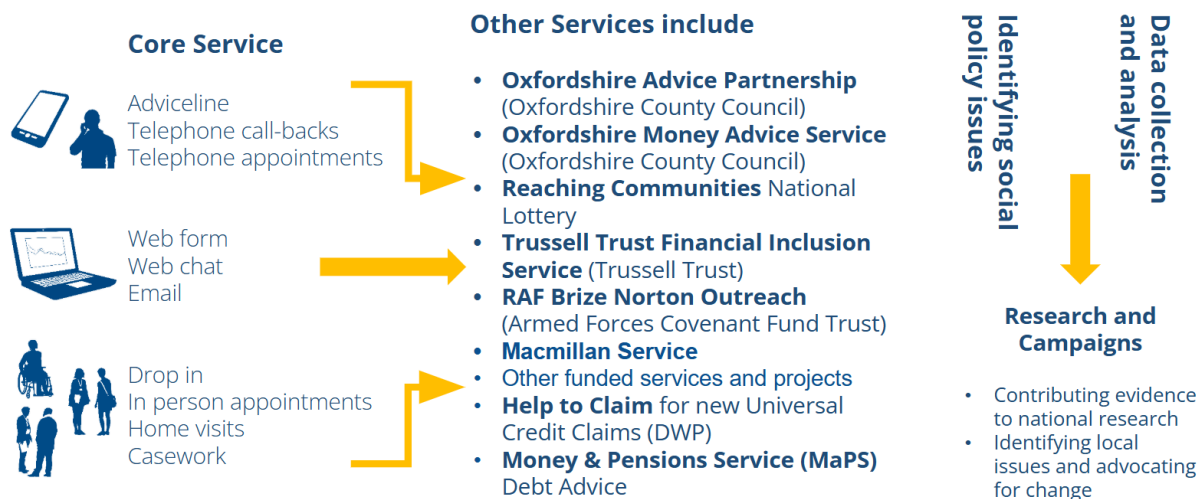
They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.



How Citizens Advice Oxfordshire works



We provide a range of advice, guidance and support services to the people of Oxfordshire and beyond. We give advice on many issues, including; debt, benefits, employment, housing, consumer rights and relationship problems. We believe no one should have to face these problems without good quality independent advice.

● **Our values**

We're inventive. We're not afraid of trying new things and learning 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.