



## Training and Support Officer

### Job pack

Thank you for your interest in working at Citizens Advice Sefton. 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 will find:

- Information about Citizens Advice Sefton
- The role profile and personal specification
- Terms and conditions
- What we offer to our staff

#### Want to chat about this role?

If you want to chat about the role further, you can contact our recruitment panel by emailing [recruitment@citizensadvice.org.uk](mailto:recruitment@citizensadvice.org.uk)



As users of the disability confident scheme, we guarantee to interview all disabled applicants who meet the minimum essential criteria for the vacancy. We welcome applicants from diverse backgrounds e.g. the LGBT+ community and ethnically diverse backgrounds.

## **Citizens Advice Sefton**

Citizens Advice Sefton is situated in Merseyside, neighbouring Liverpool, Knowsley and West Lancashire. Originally established in Bootle in 1939, the service merged offices across Sefton to become a single borough wide service in 2008. We have permanent offices in Bootle and Southport, but we also work in partnerships across Sefton in community organisations. Sefton is a very diverse borough in socio economic terms with multiple wards categorised as among the most deprived wards in England alongside wards categorised as the least deprived (and most wealthy) in England in the Indices of Deprivation. Only Kensington and Chelsea have a starker contrast between wealth and deprivation in one borough.

We employ 30 people, and we have 50 volunteers. Around 70% of enquiries are related to benefits and debt. We have a money advice team funded by the Greater Merseyside Money Advice Partnership (GMMAP) via a service level agreement with The Money Advice and Pension Service. We are also funded by Public Health in a multi-agency partnership led by Sefton Council for Voluntary Service – Living Well Sefton. Our welfare rights team work within this network and we also work within foodbanks, community groups and Clock View, a mental health hospital. Our aim is to tackle poverty and social injustice. We have recently added a housing outreach advice service as housing issues are becoming more prevalent in Sefton. We work with Citizens Advice Liverpool to provide a tribunal representation service. In addition we also provide a wellbeing mentoring service, financial resilience and energy advice.

We recruit local volunteers who train as assessors, advisers, admin, reception and support roles or who undertake research and campaigns work based on client evidence. Our Board of Trustees are also volunteers.



## **JOB Description**



### **The role**

We're looking for a confident and motivated individual to join our team as a Training and Support Officer. This rewarding role offers the chance to make a real impact by supporting volunteer development and helping to maintain high-quality advice delivery across our service. It's well suited to someone with a solid background in advice work and proven experience in mentoring or training others, who is passionate about learning and committed to fostering growth within a supportive, client-focused environment.

The post holder may be required to work from other office locations in Sefton.



### **Job Description**

#### **Advice giving**

- 1 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.
- 2 Research and explore options and implications so that clients can make informed decisions.
- 3 Act for the client where necessary by calculating, negotiating, drafting or writing letters, telephoning and representation at appeal.
- 4 Negotiate with third parties such as statutory and non-statutory bodies as appropriate.
- 5 Ensure that all work conforms to the office manual and the Quality Standards as appropriate.

- 6 Maintain detailed online case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

### **Research and campaigns**

- 7 Assist with social policy research and campaigns work by providing information about clients' circumstances via appropriate channels
- 8 Alert clients to research and campaigns options.

### **Professional development**

- 9 Keep up to date with legislation, policies and procedures and undertake appropriate training.
- 10 Read relevant publications and attend relevant internal and external meetings as agreed with the line manager.

### **Administration**

- 11 Use IT for statistical recording of information, for record keeping, document production, research and campaigns and funding requirements.
- 12 Ensure IT information assurance training is completed on an annual basis.
- 13 Ensure that all work conforms to our systems and procedures.
- 14 Provide statistical information on the number of clients and nature of cases.

### **Other duties and responsibilities**

- 15 Complete the required training to comply with quality assurance processes.
- 16 Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
- 17 Demonstrate commitment to the aims and policies of the CAB service.
- 18 Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.



## Person specification

### Job Purpose

To develop, deliver, and coordinate training and mentoring for advisers and volunteers, while supporting the day-to-day running of advice sessions. You will ensure all team members are confident, capable, and meet Citizens Advice standards, while also stepping into advice roles when needed.

### Key Responsibilities

#### Training, Development, and Mentoring

- Identify training needs within the team and contribute to the organisational training plan as well as coordinate or deliver training where appropriate to build skills and enhance service quality.
- Conduct observed interviews and give constructive feedback to improve performance.
- To assess competencies of generalist advisers under the Citizens Advice framework
- Provide one-to-one mentoring and group workshops for ongoing development.
- Support continuous learning through structured feedback and reflective practice.
- Identify skills gaps and adapt training content accordingly.
- Foster an inclusive and empowering learning culture.

#### Advice Delivery and Session Support

- Deliver high-quality advice to clients via all channels (face-to-face, phone, email, webchat), especially during high demand or limited staffing.
- Provide real-time technical and practical support to volunteers during

advice sessions.

- Assist with the smooth running of advice sessions, including volunteer prep and debrief.
- Work closely with the Advice Delivery Lead to ensure session coverage and quality assurance.
- Volunteer Recruitment and Support
- Support the Advice Delivery Lead in recruiting and inducting volunteers.
- Maintain accurate records of training progress, feedback, and development milestones.
- Champion volunteer engagement and recognition.

#### Service Quality and Research & Campaigns

- Stay up to date with advice sector developments, policy changes, and Citizens Advice standards.
- Encourage and support advisers to identify evidence for research and campaigns.
- Share insights with the Advice Delivery Lead to inform service improvements.

## **Person Specification**

### **Essential**

- Significant experience in providing advice, with knowledge across key areas (benefits, debt, housing, employment).
- Experience training or mentoring others in a client-focused setting.
- Strong communication skills, especially in simplifying complex issues.
- Ability to provide effective support and constructive feedback to volunteers.
- Strong organisational skills and ability to manage varied responsibilities.
- Proficiency in using case management and IT systems.
- Commitment to equality, diversity, and inclusive development practices.
- Experience working to Citizens Advice or similar quality standards.

### **Desirable**

- Experience delivering training in an adult learning environment.
- Knowledge of learning design or volunteer development frameworks.

### **Personal Qualities**

- Passionate about learning, development, and empowering others.
- Friendly, approachable, and team-oriented.
- Adaptable, proactive, and solution-focused.

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



## Terms and conditions

Salary: £28,436 FTE Actual £17,061

Hours: 21 hours

Annual Leave: 28 days plus Bank Holidays (part time pro-rata)

Location: Southport

Pension: 7% (If you pay at least 1% salary contribution into the stakeholder scheme we will top this up to the required 8%)

### What we offer to our staff

- A contribution of 7 % of your salary into a Stakeholder Pension
- Development and training
- Cycle to work scheme

Application is by CV and the completion of an online application form. For an application pack and application form go to <https://seftoncab.org.uk/jobs/> or email [recruitment@seftoncab.org.uk](mailto:recruitment@seftoncab.org.uk) or telephone 0151 282 5650 for paper copies.

Please note: **Closing date for applications: 12pm Monday 7<sup>th</sup> July 2025**

Interviews: **tbc**