Job Title: Benefits Team Caseworker

Thank you for your interest in working with Citizens Advice Sefton. This job pack provides the information you need to apply for the role and to understand what it means to work as part of the Citizens Advice service.

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

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, including the LGBT+ community and ethnically diverse backgrounds.

Citizens Advice Sefton

Citizens Advice Sefton is based in Merseyside, neighbouring Liverpool, Knowsley and West Lancashire. Originally established in Bootle in 1939, the service merged offices across Sefton in 2008 to become a single borough-wide service. We have permanent offices in Bootle and Southport, and we also work in partnership with community organisations across Sefton.

Sefton is a diverse borough in socio-economic terms, with multiple wards among the most deprived in England alongside some of the least deprived. Around 70% of our enquiries relate to benefits and debt. Our money advice team is funded by the Greater Merseyside Money Advice Partnership (GMMAP) through a service level agreement with the Money Advice and Pension Service. We are also funded by Public Health as part of Living Well Sefton, a multi-agency partnership led by Sefton Council for Voluntary Service. Our welfare rights team works within this network, as well as in foodbanks, community groups and Clock View acute mental health hospital. Our aim is to tackle poverty and social injustice, and we work with Citizens Advice Liverpool to provide a tribunal representation service.

We recruit local volunteers who train as assessors, advisers, administrators, reception volunteers and support workers, as well as volunteers who carry out research and campaigns work based on client evidence. Our Board of Trustees are also volunteers.

Welfare Benefits Caseworker

The role

We are looking for an experienced adviser to join our passionate and dedicated team of advisers and caseworkers, helping people in Sefton with the problems they face.

The post holder may be required to work from other office locations in Sefton and to deliver advice sessions in outreach locations such as job centres, mental health settings and community venues. The adviser will provide a general advice service to members of the public, with welfare benefits and Universal Credit forming the main areas of advice need. They will work closely with the welfare rights and money advice teams at Citizens Advice Sefton, as well as with Living Well Sefton partners, mentors and neighbourhood partners.

Job Description

Advice giving

1 Interview clients using sensitive listening and questioning skills 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 clients where necessary by calculating entitlements, negotiating, drafting or writing letters, telephoning, and representing clients 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 to support 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 through 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 information assurance training is completed annually.
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

Experience	
1	Recent experience of providing benefits advice in an advice setting, such as Citizens Advice or a similar organisation.
2	Ability to advise on debt and other social welfare issues.
3	A thorough understanding of the issues involved in interviewing and working with clients, particularly vulnerable people.
4	Proven ability to work well in a busy, pressured environment, both as part of a team and independently when required.
5	Experience of explaining complex information to clients and checking accuracy of calculations.
Skills	
6	Ability to represent clients at tribunal hearings, or willingness to undertake training to do so.
7	

8	Good verbal and written communication skills, with the ability to advocate on behalf of clients when necessary.
9	Excellent interpersonal skills, including the ability to relate to and work with a diverse range of people and organisations.
10	Good word processing skills, experience of searching for and using reliable online and paper-based resources, and the ability to learn IT applications as required.
	Ability to prioritise own workload, meet deadlines and work flexibly.
Knowledge	
11	Good understanding of social welfare law enquiry areas.
12	A good understanding of equality and diversity issues and policies.
13	Understanding of the issues affecting society and their implications for clients and service provision.
Other	
14	A commitment to continuous professional development.
15	Understanding and willingness to commit to the aims and principles of the Citizens Advice service.

In accordance with Citizens Advice national policy, the successful candidate may be screened by the Disclosure and Barring Service (DBS). A criminal record will not necessarily prevent someone from taking up the role.

Terms and conditions

Salary: 35 hours | £27,668

Contract type: Permanent

Annual leave: 28 days excluding bank holidays

Location: Based in Sefton and advice outreach settings.

Office hours: Monday to Friday, 9am–5pm

Pension: 7% employer contribution

What we offer to our staff

Why join us?
At Citizens Advice Sefton, you'll be part of a team committed to tackling poverty and social injustice. We offer:

- 7% employer pension contribution (with 1% employee contribution)
- 28 days annual leave plus bank holidays (pro rata)
- Ongoing development and training
- Cycle to Work scheme

To request a job pack, visit https://seftoncab.org.uk/jobs/, email recruitment@seftoncab.org.uk or telephone 0151 282 5650 for paper copies. Applications should be submitted using the application form. Welfare Benefits Caseworker – Fill in form

Please note: **Closing date for applications: Friday 6 November 2026**

Interviews: week commencing 9th November 2026