



Information Pack – Trainee Benefits Caseworker (Appeals Team) Vacancy

September 2026

Thank you for your interest in working at Citizens Advice Bath and NE Somerset. This pack will give you everything you need to know to apply for this role and what it means to work for us.

In this pack you'll find:

- About Citizens Advice Bath and NE Somerset
- Our values
- Role profile
- Job description
- Person specification
- Terms and conditions
- What we offer our staff
- Recruitment timetable and how to apply

About Citizens Advice Bath and North East Somerset

Citizens Advice Bath and NE Somerset is an independent local charity providing information and advice to residents of the Bath and NE Somerset (B&NES) area. We aim to empower people to resolve their problems and change their lives for the better.

We provide free, independent and confidential advice; whoever you are, whatever the problem. We help people overcome their problems and campaign on big issues when their voices need to be heard. We value diversity, champion equality, and challenge discrimination and harassment.

We're here for everyone in the Bath and NE Somerset area and we work in partnership with other local services to provide the best possible advice and information to meet the needs of local residents.

We offer information and generalist advice on any issue and specialist benefits and debt advice. We also offer specialist legal advice delivered by professionals acting on a pro bono basis. We offer advice by phone, at drop-in sessions and face-to-face

appointments. Details of all our advice services are on our website – www.citizensadvicebanes.org.uk

We currently employ 24 paid staff and have around 65 volunteers who deliver most of our generalist advice service and work in a variety of support roles. Our current annual turnover is just over £1M; we actively seek to develop new projects and services to meet identified need. We are members of the national Citizens Advice network and hold the Advice Quality Standard. We are founding partners of the local Community Wellbeing Hub.

As well as giving advice we aim to prevent the problems that affect people's lives – we collect evidence of practices and policies that cause the issues we help with; our knowledge of clients' problems and circumstances enable us to campaign for change to get a fairer deal for everyone. This Research and Campaign work is a pivotal part of our work.

Our values – how we will act

- We aim to be inventive, curious and collaborative, across and beyond the organisation.
- We respect and actively support individuality and diversity.
- We are passionate about our mission; we challenge situations that are unjust and unfair and act with focus and compassion.

We are committed to building a diverse and inclusive workforce and warmly welcome applications from people of all backgrounds. We particularly encourage applications from people from Black, Asian and other ethnically diverse communities, and from disabled people, who are currently underrepresented in parts of our organisation and sector.

We believe that a diverse range of experiences, perspectives, and identities strengthen our services and helps us better reflect and serve the communities we work with. We are committed to creating an inclusive working environment where everyone is treated with dignity, respect, and fairness, and where individuals can thrive and reach their full potential.

If you require any adjustments during the recruitment process, please let us know and we will do our best to support you.

As an organisation committed to equity, diversity and inclusion, we are particularly keen to hear from people whose lived experience and backgrounds may bring valuable insight into the diverse communities we support.



The role

We are looking for a motivated and organised Trainee Benefits Caseworker to join our dynamic Appeals Team. You may not be a benefits specialist (just yet), but we would love to receive applications from candidates with casework experience or experience of working with vulnerable clients in similar fields. An interest in benefit appeals is essential.

Applicants will be encouraged to work in the office, with the rest of the Appeals Team, however, a hybrid working pattern will be considered for the right candidate.



Role profile

The Appeals Team

The Appeals Team currently consists of 3 caseworkers, and we represent members of the public in any kind of benefit appeal. The majority are Personal Independence Payments and Universal Credit (especially work capability assessments), but also Disability Living Allowance and overpayments of any kind.

When the appeal has been lodged by His Majesty's Courts and Tribunals Service, we receive the bundle of appeal papers from the Department of Work and Pensions, which we study. We then interview the client with a view to producing a submission to put the client's case to the Tribunal and challenge DWP's decision.

We have a 95% success rate (against 60/65% nationally) and we earn around £1 million for clients and our CA outcomes. This is very rewarding work which makes a real and obvious difference to clients. We have regular meetings with judges and the DWP, which gives us the opportunity to suggest changes advantageous to appellants in general (not just our clients). Our ideal candidate would have a basic knowledge of benefits (we will provide more specialist training on the job) and an ability to analyze and explain entitlement with reference to the relevant criteria.



Person Specification

- 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 in the delivery of advice.
- An understanding of the benefit systems, especially the appeals process and its impact on client groups.
- An understanding of the issues affecting society and the implications of these in providing quality services to our clients.
- Ability to research, analyze and interpret complex information, and communicate effectively verbally and in writing to a variety of audiences.
- Competent in literacy and numeracy and the ability to interpret financial information.
- Ability to manage own caseload and manage time effectively.
- Ability to use IT systems and packages, and electronic resources in the provision of a service.
- A commitment to continuous professional development.

Main areas of responsibility

Learning, development and training

- Identifying own learning and development needs.
- Undertaking all training identified for the role.
- Keeping up to date on benefits advice case law and practice.
- Sharing knowledge and resources with other teams within the organisation.

Casework

- Providing updates to clients about the progression of their benefit appeal, and explaining the court process to clients face to face and over the phone.
- Contacting clients to request additional information where required.
- Compile appeal paperwork ready for submission to HMCTS.
- Acting for the client where necessary through negotiation and advocacy.
- Assisting clients with other related problems and liaising with other internal and external services, including DWP and HMCTS.
- Refer clients to internal colleagues for non-benefit related advice and support where a need is identified.
- Ensuring that all casework meets Citizens Advice quality standards.
- Maintaining case records for the purpose of continuity of casework, statistical monitoring, and quality standards.
- Ensuring that all work conforms to the organisations systems and procedures and funder requirements.

- Working with the team to develop the provision of benefits advice, including the development of digital channels and AI in line with organisational procedures.

General

- Keeping up to date with Citizens Advice aims, policies and procedures and ensure these are followed.
- Ensuring that work reflects and supports the Citizens Advice service's equality and diversity strategy.
- Working cooperatively with colleagues and contributing to team meetings
- Abiding by health and safety guidelines and sharing responsibility for own health and safety and that of colleagues.
- Carrying out any other tasks within the scope of the post to ensure the effective delivery and development of the service.
- Supporting volunteer team members.



Terms and conditions

Location:	5 Palace Yard Mews, Bath BA1 2NH
Salary:	Trainee rate £27,500 (pro rata), rising to £28,642 (pro rata)
Hours:	15 hours per week, days to be discussed at interview
Contract:	3-year contract with extension subject to funding



What we offer our staff

- 6% employer pension contribution
- Flexible working arrangements
- 24-hour access to online wellbeing and mental health support.
- Training through our nationally recognised Citizens Advice Generalist Certificate in Advice.
- 5 weeks annual leave, plus bank holidays and additional days between Christmas and New Year. Additional long service days are provided from the 5th year of service.

To apply

Job pack and application forms can be found by visiting:
www.citizensadvicebanes.org.uk/about-us/job-vacancies

If you have any questions, please email our Office Manager emily.davies@cab-banes.org

To apply, please download and complete the application form and e-mail it to emily.davies@cab-banes.org, or post it to Emily Davies, Citizens Advice BaNES, 5, Palace Yard Mews, Bath, BA1 2NH

Please address each point of the person specification in your application.

Closing date: Wednesday 14th October at 5pm

Interviews will take place on **Wednesday 21st October 2026** at Palace Yard Mews
You must be entitled to work in the UK and appointments will be made subject to references.