

**Telephone Assessment Officer**

**Job Pack**

Thank you for your interest in working at Citizens Advice Bury & Bolton. This job pack should give you everything you need to know to apply for this role and what it means to work for the Citizens Advice service.

In this pack you’ll find:

* Our values
* 3 things you should know about us
* How the Citizens Advice network works
* Information about the organisation, team and the role
* The role profile and person specification
* The benefits of working for the organisation
* Our approach to equality and diversity.

# **Citizens Advice Bury & Bolton (CABB) – About Us**

We are a dedicated local charity committed to offering free, impartial, and confidential advice, information, and support to individuals across Bury & Bolton (with some out of area services). We value diversity, promote equality and challenge discrimination.

We are committed to putting equality and equity at the heart of everything that we do, with the overarching aim of being the go-to charity for anyone across Bury & Bolton in need of help, to find a way forward. This means we look at improving access, treating people with empathy and promoting an inclusive working environment for all of our colleagues.

As an individual charity, the Board of Trustees have overall responsibility for the strategic direction and oversight of CABB, delegating day to day management and delivery to the CEO and wider Executive Team, consisting of:

* Chief Executive Officer
* Director of Advice
* Director of Finance

Whether individuals are facing a single issue or a complex set of problems we provide personalised one-to-one advice. During 2022/23, we assisted 15,000 individuals and addressed over 51,500 unique issues.

**We do more than fix immediate problems, our advice makes a significant difference to the people we help:**

A few blue and white signs

Description automatically generated

A close-up of a chat

Description automatically generated

# Our values

**We’re inventive** - We’re not afraid of trying new things and learn 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.

# 3 things you should know about us

## **We’re local**

We have offices in Bury and Bolton, and deliver outreach sessions for clients across Bury, Bolton and other areas of Greater Manchester. During 2022/23, we supported 15,000 clients with 51,500 issues, including welfare benefits, money and energy advice, housing, immigration and community care.

## **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.

## **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.

How the Citizens Advice network works

Citizens Advice Bury & Bolton is a

member of the Citizens Advice service nationally with circa 257 local Citizens Advice members. A diagram of a customer service

Description automatically generated

Citizens Advice nationally is a charity which includes 1000 national staff working in one of 4 offices, as homeworkers or as part of the Witness Service from over 240 courts across England and Wales 2500 Witness Service volunteers.

Local Citizens Advice are all independent charities, delivering services from over 600 local Citizens Advice outlets over 1,800 community centres, GPs’ surgeries and prisons.

The network does this with 7,700 local staff and over 21,300 trained volunteers.

You can find out more about us via:

* Take a look at the [Citizens Advice Bury & Bolton](https://www.cabb.org.uk/) website.
* Take a look at the [national Citizens Advice](http://www.citizensadvice.org.uk) website and the Citizens Advice [Campaigning site](https://wearecitizensadvice.org.uk/).

# The Vacancy

Thank you for your interest in our **Telephone Assessment Officer** vacancy.

The Application Process

### Stage 1

Please submit your CV **and** a cover letter; this will be screened against the role description and person specification (below).

Your CV & covering letter should be sent to [jobs@cabb.org.uk](mailto:jobs@cabb.org.uk), by the closing date/ time.

Please ensure your CV includes the following information:

* Your contact details (address, telephone number and email address)
* Information about your education history
* Information about your career history
* Details of any professional qualifications including memberships

Please ensure your covering letter includes the following information:

* Your suitability for the role against the person specification outlined below. This is a key part of the process which allows you to provide evidence of your experience, knowledge, skills and abilities that are relevant to the role as described in the role profile.

**Should this information not be included, your application for the role will not be taken forward.**

Unfortunately, we are unable to provide feedback on applications which are unsuccessful at stage 1.

Stage 2

Pending meeting the required standard in responses at stage 1, you will be invited to a face-to-face panel interview. During the panel interview, you may be asked to deliver a presentation (your invite will state if your interview is in-person or held via zoom and details of any presentation required).

Our application/ screening processes are outlined above. We also require a completed application form to be held on file – we will request this from the successful applicant when we make a formal employment offer.

Key Dates

|  |  |
| --- | --- |
| **Closing date** | 27th November 12noon |
| **Interview date** | 4th December 2023 |

|  |
| --- |
| **Want to chat about the role?**  If you want to have a chat about the role further, you can contact us via jobs@cabb.org.uk. |

We wish you every success in your application. Thank you for taking the time to consider joining us.

# The Role

|  |  |
| --- | --- |
| **Role** | Telephone Assessment Officer |
| **Reporting to** | Volunteer & Engagement Manager |
| **Salary** | £19,891 - £22,129 pro-rata |
| **Hours** | 18-21 hours per week (Part-time, working Tuesday – Thursday) |
| **Term** | Fixed term until 30th August 2024 |
| **Location** | This is an in-office role working across Bury & Bolton (Option for hybrid working post probation) |

|  |
| --- |
| Citizens Advice Bury & Bolton (CABB) is a leading provider of legal advice and information, supporting thousands of clients every year. We are a busy, client focused and dynamic service with a track record of delivering high quality advice.  The Telephone Assessment Officer will be the first point of contact for clients who contact us via our freephone adviceline service – this is a busy service, prioritising callers from across Bury and Bolton. The service also supports callers from other areas of the Citizens Advice network.  As part of the role, we are looking for a self-motivated, enthusiastic, and organised team player who can help drive forward the service. No experience working in the charity sector is needed but the successful candidate will have a keen interest in helping people in need, no matter what their background. You will have effective communication skills and an ability to work pro-actively to targets, both individually and within a team, along with being able to demonstrate effective computer literacy.  *At CABB, we value diversity, promote equality and challenge discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from racially minoritised communities.* |

## 

## Role Profile

|  |  |
| --- | --- |
| **Key accountabilities** | **Key elements & tasks** |
| Service Delivery | To interview, identify client’s advice requirements and capabilities, undertake full exploration of their advice needs, deliver advice and complete accurate client case records, in accordance with the Citizens Advice quality standards. |
| Identify key information (e.g. priority and non-priority issues) about the problem including time limits, key dates and any requirement for urgent advice or action. |
| Assess client’s problem(s) using sensitive listening and questioning skills. |
| Identify and summarise the essence of the problem. |
| Provide accurate and timely data into databases and case management systems, including capturing expected outcomes, clearly explain our service delivery processes, support the timely flow of clients to advisers and manage waiting time expectations. |
| Assess and agree the appropriate next step, taking into consideration the client’s ability to take action themselves, the complexity of the problem and the organisation’s resources. |
| Refer clients appropriately (both internally and externally) to meet client’s needs. |
| Provide clients with information and self-help packs, as appropriate. |
| Maintain confidentiality at all times, in line with statutory requirements and office policies. |
| Develop and maintain broad oversight and practical knowledge base of services provided by CABB. |
| Research and Campaigns | Support our research and campaigns work through various channels including case studies, data collection and client consent. |
| Teamwork | Develop, and maintain, good team working relationships and communication between colleagues of all levels (paid and unpaid), both internally and externally. |
| Work flexibly across the service, ensuring the evolving needs of the service are met. |
| Attend relevant internal and external meetings as agreed with your line manager. |
| Work with colleagues to maintain a positive working and learning environment, in which equality and diversity are well managed, dignity at work is upheld and volunteers achieve their full potential. |
| Service Development | Assist with the development of the service locally, regionally and nationally, publicising work as and when necessary. |
| Carry out other tasks within the scope of the post to ensure the effective delivery and development of the role. |
| Training | Proactively identify your own training needs in conjunction with your designated supervisor and be prepared to undertake required/ mandatory training. |
| Other duties and responsibilities | Liaise, as appropriate, with relevant outside agencies (voluntary and statutory), other Local Citizens Advice offices and other stakeholders. |
| To present a professional appearance, help maintain an orderly working environment, and act at all times to uphold the good reputation of Citizens Advice. |
| To comply with all published organisational policies and procedures. |
| Work flexibly to undertake such other reasonable duties and responsibilities. |
| Provide overall administrative support on various projects, responding to change and developments as required. |
| Assist with ensuring there are appropriate resources available to ensure advice delivery systems and mechanisms are effective. |
| Please note that this job description does not constitute a ‘term and condition of employment’. It is provided only as a guide to assist an individual in the performance of the job and is not included to be an inflexible list of tasks.  The Citizens Advice Service is a fast-moving organisation and therefore an employee’s duties may be varied from time to time. The post holder accepts that they may be required to work flexibly and undertake any other work or duties as may reasonably be required, within the scope of and commensurate to the nature of the post. | |

Person Specification

(all criteria are essential unless otherwise indicated)

|  |
| --- |
| **Experience** (through paid or voluntary work) |
| Experience of working within an advice and information organisation within the third/ charity sector (desirable) |
| Basic knowledge of one or multiple enquiry areas (ie benefits, debt, housing, employment, family and immigration) (desirable) |
| Experience of working or volunteering at Citizens Advice or other not for profit organisation (desirable) |
| Experience of using sensitive listening and questioning skills to get to the root of issues and empower clients, whilst maintaining structure and control of meetings and interviews |
| Experience of flexible working according to business demand |
| Proven experience of using Microsoft Office, and/ or web-based databases/ platforms |
| Experience of working towards targets |
| Experience of communicating effectively, both orally and in writing, with a wide range of people |
| **Knowledge** |
| A comprehensive understanding of office and administration procedures |
| A thorough understanding of professional boundaries and the issues surrounding confidentiality, data protection and information assurance |
| **Qualifications and Training** |
| GCSE (or equivalent) to an appropriate standard |
| **Skills and Abilities** |
| Excellent time management skills |
| Strong attention to detail and a high level of accuracy |
| Experience of and an ability to deal with clients in a calm, respectful and effective manner |
| Ability to demonstrate professionalism in person and on the telephone at all times |
| Ability to work on own initiative, proactively manage a varied workload, ensuring deadlines are met |
| Effective written and verbal communication skills, including the ability to deal appropriately with a range of people via face-to-face, telephone and digital communication methods |
| The ability and willingness to liaise with outside agencies, and build effective working relationships with local and regional partners |
| Excellent verbal, written & numerical skills |
| **Additional Factors** |
| Ability and willingness to work as part of a team and a commitment to collective team responsibility |
| Understanding of, and commitment to, the aims and principles of the Citizens Service in which equality and diversity is embedded throughout |
| Ability to use cloud based systems and IT packages, including, word processing, spreadsheets and email (maintain one or more electronic diary/diaries), and the ability to use or learn to us-e other packages as necessary |
| Awareness that Citizens Advice clients are at the heart of everything we do |

# What we give our staff

We value the people who work here - and we show that in what we offer. As well as things like annual leave and our workplace pension, working at Citizens Advice means getting access to many benefits.

* [Citizens Advice Bury & Bolton employee benefits package](https://www.cabb.org.uk/work-with-us/)

# Equality and diversity at Citizens Advice

We are fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us.  
  
To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.  
  
**We judge the application, not the person.** The selection panel won’t see your personal details. This makes sure each person’s response is judged on its merits and not on their background.  
  
Our commitment to equality runs through everything we do - read the [Citizens Advice Stand up for Equality Strateg](https://www.citizensadvice.org.uk/Global/CitizensAdvice/Equalities/CAB337_Equality_strategy_text_FINAL.pdf)y to find out more.

# Additional information

Please see the [CABB website](https://www.cabb.org.uk/recruitment-policy/) for information on the following:

* Disability
* Entitlement to work in the UK
* Diversity monitoring
* GDPR: How we will use your information
* References
* Criminal Convictions/DBS

We wish you every success in your application, and thank you for taking the time to consider joining us.