



# Client Services Officer Job pack

Thanks for your interest in working at Citizens Advice. 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:

- Our values
- 3 things you should know about us
- Information about the team, organisation and role
- The role profile and person specification
- The benefits of working at Citizens Advice
- Our approach to equality and diversity

## **Want to chat about this role?**

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



## 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

**1. We're local and we're national.** We have 6 national offices and offer direct support to people in over 290 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.

# How our organisation works

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

This role sits in the national charity, which includes

- 800 national staff working in one of our 6 offices or as homeworkers, or as part of the Witness Service from over 240 courts across England and Wales
- 3000 Witness Service volunteers

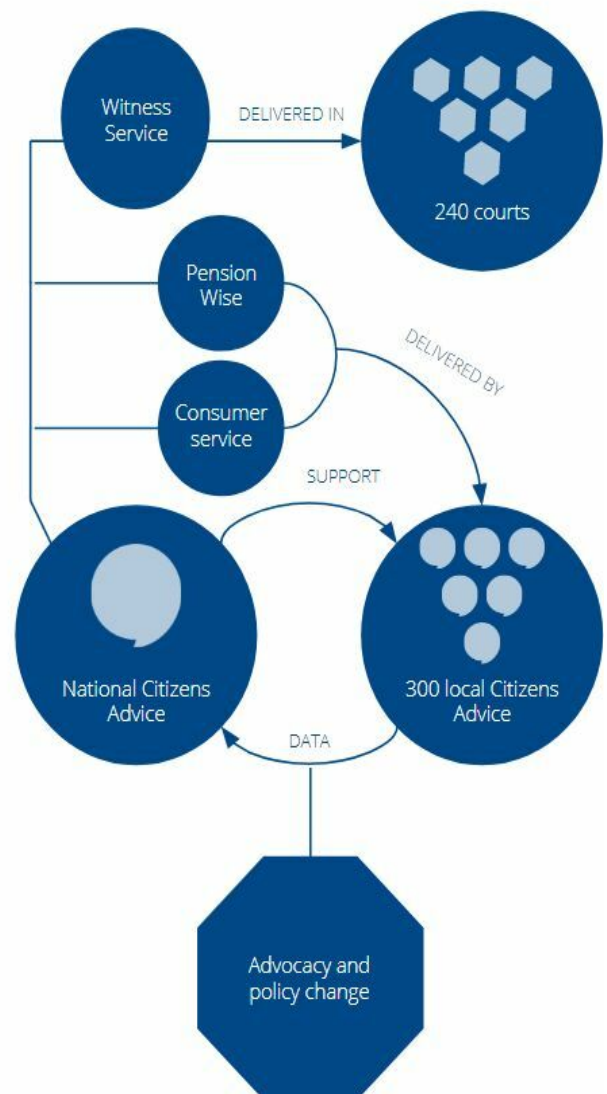
Our network members are all independent charities, delivering services from

- 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.





## The team

The role you're applying for is in the **Performance and Quality** directorate and in the **Client Services team**. Here are **2** ways you can find out more about us:

1. <https://www.citizensadvice.org.uk/about-us/contact-us/contact-us/make-a-complaint-about-us/>
2. <https://www.citizensadvice.org.uk/about-us/contact-us/contact-us/check-how-we-deal-with-your-complaints/>



## The role

Citizens Advice provides free, independent and impartial advice and information to help people resolve their legal, money and other problems. In the past year we have helped over 2.5 million people solve over 6.2 million problems. Our national network delivers services from over 3,000 locations in England and Wales. In 2015 we won Charity Times Charity of the Year for our work. Now we want to do even more.

Citizens Advice strives to ensure that as many people as possible can benefit from high quality advice services. We place client protection and care at the heart of our service, and as such we are currently looking for a passionate and enthusiastic Client Services officer to put our client-focused philosophy into practice.

Your remit will include ensuring that all complainants are responded to in a timely, efficient manner, ensuring that the relevant complaints procedure is diligently followed at all times. Moreover, you will be responsible for implementing the processes and systems for providing criminal records screening for Citizens Advice service paid staff and volunteers in England and Wales.

**This post will require you to make decisions relating to the appropriate response to complainants by email, phone, letter and/or social media, therefore you will demonstrate the capacity to use judgment under pressure, and you'll also possess excellent written and verbal communication skills. Previous experience in a customer service focused environment is essential.**

**Citizens Advice values diversity, promotes equality and challenges discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled and Black, Asian and Minority Ethnic people, as they are currently under represented in our workforce.**



# Role profile

## ROLE PROFILE

<b>Band</b>	Officer	
<b>Reporting to</b>	Client Services team leader	
<b>Proficient salary</b>	£27,769 per annum	
<b>Location</b>	Birmingham	Travel H/M/L:L
<b>Role purpose</b>	<ul style="list-style-type: none"><li>• To ensure all complainants are responded to in a timely way, under the relevant complaints procedure.</li><li>• To implement the processes and systems for providing criminal records screening via the Disclosure and Barring Service for Citizens Advice service paid staff and volunteers in England and Wales.</li><li>• To implement the processes and systems for supporting Citizens Advice's duty as a Competent Authority to deliver Debt Relief Orders.</li></ul>	
<b>Main responsibilities</b>	Key elements/Tasks	% of Time
<b>Deliver individual strategic projects/business plan objectives relating to client protection and client care</b>	<p>Working with:</p> <ul style="list-style-type: none"><li>• Performance and Quality team.</li><li>• Other teams in Operations division and all other divisions in Citizens Advice.</li><li>• Citizens Advice branded local Citizens Advice, consortia and service providers.</li><li>• Partner organisations</li></ul> <p>Deliver the following business plan objectives:</p> <ul style="list-style-type: none"><li>• Ensure all complainants are responded to in a timely way, under the relevant complaints procedure.</li><li>• Implement the processes and systems for providing criminal records screening via the Disclosure and Barring Service (DBS) for Citizens Advice service paid staff and volunteers in England and Wales.</li><li>• Implement the processes and systems for supporting Citizens Advice's duty as a Competent Authority to deliver Debt Relief Orders.</li></ul>	40

Through the following tasks:

- Deciding on an appropriate response to complainants by email, phone, letter and/or social media.
- Ensuring that complainant needs for reasonable adjustments are considered and responded to appropriately.
- Passing on complaints to local Citizens Advice Chief Officers and Chairs, to relevant Managers in Citizens Advice or to partner organisations.
- Ensuring complaints are escalated appropriately and that deadlines are met.
- Supporting the Client Services team leader to produce high quality Citizens Advice reviews of complaints against Citizens Advice branded service providers, including drafting chronologies, findings, and conclusions and drafting directions to the service provider on behalf of the Chief Executive.
- Supporting the Client Services team leader to respond to Subject Access Requests from complainants.
- Ensuring local Citizens Advice and relevant Citizens Advice staff have appropriate forms to apply for a criminal record screening checks.
- Checking the accuracy of DBS applications and following up omissions/errors with applicants.
- Ensuring queries relating to criminal record screening checks and DROs are dealt with accurately within set timescales and that relevant issues are escalated as appropriate.
- Keeping up to date with DBS and DRO requirements on behalf of Citizens Advice as the registered body/competent authority.
- Analysing data on complaints, DBS and DRO intermediaries and providing trend and issue reports as necessary.
- Supporting the Client Services team leader and Membership and Client Services manager in providing written guidance to

	<p>local Citizens Advice and consortia when necessary.</p> <ul style="list-style-type: none"> <li>Collecting and disseminating hard and soft intelligence to relevant colleagues in Citizens Advice.</li> </ul> <p>Ensure that work undertaken reflects and supports the service's Equality and Diversity Strategy</p>	
<b>Implement best practice systems and processes</b>	<p>Use and implement best practice systems and processes to ensure that Citizens Advice service delivery in relation to client protection and client care is continuously improving.</p> <p>Maintain systems and processes for complaints management, DBS and DRO approved intermediary registration and deregistration to ensure:</p> <ul style="list-style-type: none"> <li>Management information is kept up to date.</li> <li>The Client Services team can be proactive to ensure local Citizens Advice and Citizens Advice meet deadlines for responses to complainants.</li> <li>Records of DBS applications are maintained and progress chasing can be undertaken when there are delays.</li> <li>An accurate record of DRO intermediaries authorised by Citizens Advice is maintained.</li> <li>Trends and issues are identified, analysed and reported on.</li> </ul> <p>Develop or support the development and / or updating of content for information systems.</p>	25
<b>Maintain expertise and insight</b>	<p>Manage your own day to day activities to deliver tasks on time and to the required standard while gaining experience and expertise in client protection and client care.</p>	10
<b>Contribute to team</b>	<ul style="list-style-type: none"> <li>Keep information on Citizens Advice service websites on matters dealt with by the team up to date through monitoring review dates,</li> </ul>	15

	<p>progress chasing and ensuring information is published.</p> <ul style="list-style-type: none"> <li>• Be an active member of team, identifying opportunities for your own development.</li> <li>• Contribute to the good and efficient working of the team in delivering against the business plan.</li> <li>• Liaise with teams across Citizens Advice to ensure consistency and collaborative working.</li> <li>• Comply with Citizens Advice policies and procedures, including health and safety.</li> </ul>	
<b>Finance</b>	<ul style="list-style-type: none"> <li>• Monitor and question spend on projects/day to day activities.</li> <li>• Demonstrate financial efficiency and value for money throughout work.</li> <li>• Process requisitions, invoices, expenses forms etc for payment in line with procurement guidance.</li> </ul>	5
<b>Other</b>	Undertake any other duties as may be reasonably required within the scope of the role.	5



## Person specification

### Essential Criteria

1. Excellent written and verbal communication skills including the proven ability to draft letters, reports and meeting notes dealing with complex issues.
2. Experience of providing a customer focused service including dealing with difficult and/or complex situations in a confident manner.
3. Proven ability to work within procedures and policies, including dealing with confidential material.

4. Proven ability to work on own initiative – to monitor and maintain own standards for service delivery using proven organisational and time management skills.
5. High level proven ability to work with accuracy and attention to detail.
6. Good experience of developing and maintaining administrative systems.
7. Experience of analysing data in order to report on trends and issues.

### **Desirable Criteria:**

1. Basic understanding of how disclosure and barring service criminal record checks work.
2. Basic understanding of how approved intermediaries under competent authority registered with the Insolvency Service work.
3. Experience using google drive, mail, sheets and docs.

### **Requirements for role** *(candidates will confirm at application stage and at interview)*

- Ability to contribute to an inventive, responsible and generous organisation/department culture.
- Proven ability to use IT packages, including word processing, spreadsheets, presentation packages, email, maintain an electronic diary and the ability to use or learn to use other packages as necessary.
- Willingness to travel within the UK occasionally to attend meetings.
- Understanding of, and commitment to, the aims and principles of the Citizens Advice service in which equality and diversity is embedded throughout.
- Awareness that Citizens Advice clients are at the heart of everything we do.



# Terms and conditions

## **1. PROFICIENT SALARY:** As advertised

Appointment may be at an initial salary level (90 or 95% of the proficient salary) or at the proficient salary, depending upon skills and abilities as assessed during the recruitment process.

If you are a designated essential car user, you will receive an Essential Car User Allowance payment in addition to your salary.

## **2. ANNUAL/TOTAL LEAVE**

Annual leave is 26 days pro rata per annum from 1st January to 31st December, plus 4 fixed days (normally over Christmas and New Year). Additionally, there is Long Service Leave of 1-5 days after 3-7 years service.

## **3. PENSION SCHEME**

Citizens Advice provides a Group Stakeholder scheme. Further details of this scheme will be provided to the successful applicant at offer and contract stage.

## **4. LEARNING AND DEVELOPMENT**

Citizens Advice has a co-ordinated staff training and development strategy. This will mean that training for your current job, and future career developments relevant to Citizens Advice will be provided and you will be encouraged to take an active role.

## **5. INTEREST FREE LOANS**

Interest-free loans are available to purchase season tickets for travel, and for career development purposes. If you are a designated essential car user, interest-free car loans are also available.

## **6. SALARY SACRIFICE SCHEMES**

Citizens Advice offers salary sacrifice pension and operates a Cycle to Work scheme which provide a tax-efficient method for employees to contribute to

their personal pension or purchase a bicycle for commuting to work.

## **7. DISCLOSURE AND BARRING SERVICE CHECKS (DBS)**

Some Citizens Advice positions may require the successful candidate to undergo a DBS check.

## **8. EQUALITY AND DIVERSITY**

Citizens Advice recognises the positive value of diversity, promotes equality and challenges unfair discrimination. We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable. Citizens Advice will not discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, transgender, disability, nationality, national or ethnic origin, religion or belief, marital/partnership or family status, sexual orientation, age, social class, educational background, employment status, working pattern, trade union membership or any other irrelevant factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other. All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles. Breaches of the policy may lead to disciplinary action.

## **9. DIGNITY AT WORK**

Citizens Advice is committed to providing a culture in which all staff value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

## **10. PROBATIONARY POLICY**

New appointments are subject to a six months probationary period. Performance is reviewed after three months and again after six months. At the end of the probationary period the outcome of the assessment may be confirmation of post; notice of dismissal; or at Citizens Advice's discretion, an extension of the probationary period by a further three months.

## **11. POLITICAL IMPARTIALITY**

An important part of the principle of impartiality is that Citizens Advice staff are seen to be upholding the principle of party political impartiality. To avoid possible misunderstanding or possible conflicts of interest guidelines have been established on staff taking part in party political activities. If you currently hold, or are intending to stand for local or national party political office, we will expect you to tell us about this if shortlisted for interview.

## **12. LOCATION**

As advertised

## **13. EMPLOYMENT STATUS**

As advertised

## **14. FLEXIBILITY**

Our roles are open to discussion about flexible working, which may include arrangements such as part-time working, formalised flexitime, fixed (non-standard) working hours, working from home and job-sharing.

## **15. HOURS OF WORK**

### **As Advertised**

Normal full time working hours are 9 - 5.15, Monday to Friday, although these hours may vary from week to week to meet the needs of the job. Staff may be able to agree a different working pattern with their manager.

**Citizens Advice is an operating name of The National Association of the Citizens Advice Bureaux.**



# 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.

- **A commitment to your development.** We have a coordinated staff training and development strategy. This means that training will be provided both for your current job and for your development.
- **Employee assistance programme.** Everyone working at Citizens Advice has immediate access to professional and completely confidential counselling and legal advisory services.
- **Interest free loans.** We offer loans for travel season tickets, and for career development purposes. We offer interest free car loans if you're a designated car user.
- **Support when things in your life change.** We'll be there for you with options for flexible working, career breaks, and support for parents and carers.
- **Great everyday deals.** Working at Citizens Advice gives you access to a number of deals and discounts via our Your rewards discount scheme.

You can find out more about what we offer our employees [on our website](#).



# Equality and diversity at Citizens Advice

Citizens Advice is 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 select panel won't see your personal details. This makes sure each person's response is judged on its merits and not on their background.
- **We offer a guaranteed interview scheme.** If you have a disability and your application meets the minimum criteria for the post, we'll interview you for it. [Find out more here.](#)
- **We're a Disability Confident employer.** We're committed to changing attitudes towards disability, and making sure disabled people have the chance to fulfil their aspirations. [You can find out more on our website.](#)
- **We're part of the Equality and Diversity Forum.** This means we're committed to progress on age, disability, gender, race, religion and belief, sexual orientation and broader equality and human rights issues. [Find out more here.](#)

Our commitment to equality runs through everything we do - read our [Stand up for Equality Strategy](#) to find out more.