



Quality Assessor - Pension Wise 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 Stuart Mason by emailing stuart.mason@citizensadvice.org.uk or calling 07345993267

Our values

Purpose driven - we always focus on the people who need our help

People focused - we recognise, value and reward contributions and talents in an open, fair and meaningful way

Collaborative - we build relationships across teams and locations to foster innovation and inclusive ways of working

Transparent - We're open and honest, sharing information early and often whenever we can

3 things you should know about us

1. We're local and we're national. We have 4 national offices and offer direct support to people in 265 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 circa 265 local Citizens Advice members.

This role sits in the national charity, which includes

- 1000 national staff working in one of our 4 offices or as homeworkers, or as part of the Witness Service from 240 courts across England and Wales
- 2500 Witness Service volunteers

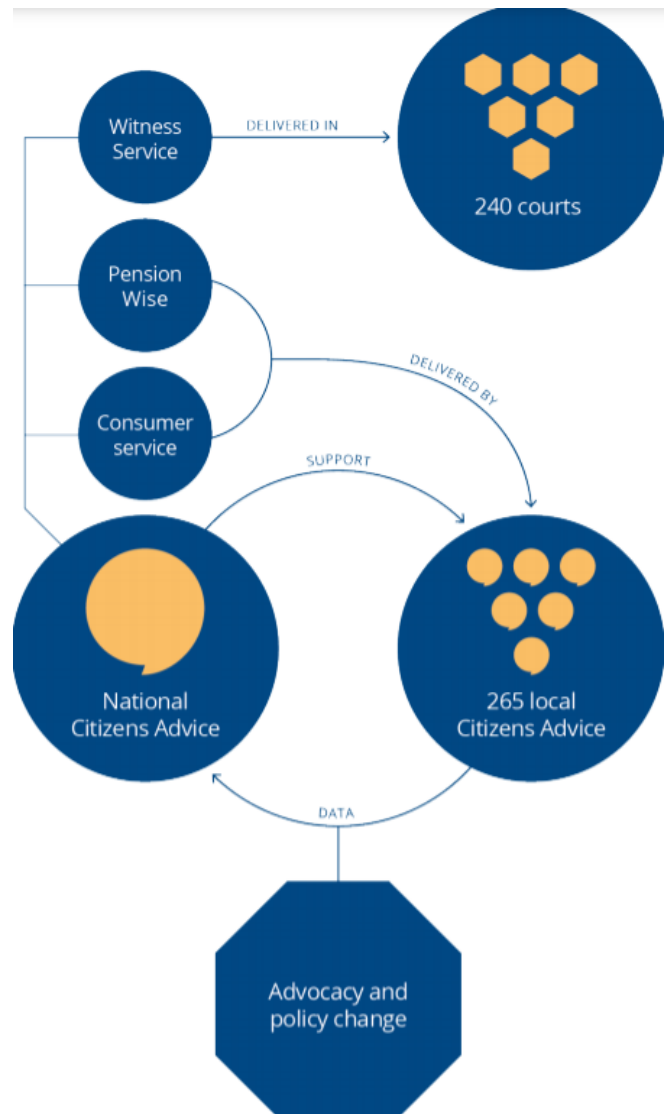
Our network members are all independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 7,700 local staff
- over 21,300 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 **Operations** directorate and in the **Quality Team**.



The role

The Citizens Advice Pension Wise service provides a vital service offering free guidance to clients on their pension options. In order to ensure that trained staff in local Citizens Advice offices continue to provide a high standard of pensions guidance to clients, we require a Quality Assessor.

This post will involve carrying out quality assurance of our delivery centres and working to determine the reliability of quality assurance across the Pension Wise service. You'll harness strong communication skills to provide verbal and written feedback on the outcomes of your observations of Pension Wise appointments within delivery centres. You'll provide written reports on your assessments of observations completed by the delivery centres. Moreover, you'll do your best to promote quality, consistency and good practice in every facet of the Pension Wise service. You'll be expected to make recommendations aimed at improving the quality of the service where necessary. You'll form strong relationships with stakeholders and our delivery centres.

To be considered for this role, you'll possess an understanding and appreciation of wider retirement issues, have knowledge of a broad range of pension arrangements and have a good foundation knowledge of pensions law and practice. Knowledge of quality assurance processes is also essential.



Role profile

Band:	Senior Officer- Lower	
Proficient salary	£38,196	
Reporting to:	Quality Assessor Team Leader - Pension Wise	
Location:	Flexible	Travel H/M/L: M
Role and Team overview:	<p>The Quality Assessor - Pension Wise, sits within a large, geographically dispersed team responsible for the delivery of quality assurance across Citizens Advice.</p> <p>The team forms part of the Quality Department, which sits within the Operations Division. The Quality Assessor - Pension Wise will also liaise closely with the Pension Wise Operations Team, which sits within the same Division. The Pension Wise Operations Team is responsible for the operational design, implementation and delivery of the Pension Wise service.</p>	
Role purpose	<p>To conduct quality assessments of Citizens Advice branded delivery centres for Pension Wise and to determine the reliability of service providers' self-assessed observations in accordance with Citizens Advice Quality Assurance Procedure for Pension Wise.</p> <p>To provide written reports on completed assessments.</p> <p>To identify areas of good practice and areas requiring improvement by individual delivery</p>	

	<p>centres and make appropriate recommendations to achieve improvement.</p> <p>To promote quality consistency and good practice, using a variety of tools and techniques.</p>	
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		% of Time
<p>Plan and deliver individual strategic projects/business plan objectives in relation to quality assurance of Citizens Advice branded client service delivery</p>	<p>Working with the Quality team, deliver the following projects/ business plan objectives:</p> <ul style="list-style-type: none"> - Conduct quality assessments of Citizens Advice branded service providers' through observing Pension Wise appointments at delivery centres. - Conduct quality assessments of Citizens Advice branded service providers' reviews of the quality of client service delivery and determine the reliability of service providers' self-assessment scores in accordance with Citizens Advice membership and Performance and Quality Framework requirements and relevant operating procedures. - Provide written reports on completed assessments - Identify areas of good practice and areas requiring improvement by individual service providers, and make appropriate recommendations to achieve improvement - Promote quality, consistency and good practice <p>through the following tasks:</p> <ul style="list-style-type: none"> - Observing Pension Wise appointments at delivery centres and listening to recording of Pension Wise appointments delivered by phone, providing feedback and completing scorecards - Assessing service providers' case records using the Citizens Advice assessment tools in 	<p>60</p>

	<p>line with agreed guidelines; covering information and guidance provided under the pensions guidance service</p> <ul style="list-style-type: none"> - Selecting case records for assessment using the Citizens Advice agreed process. - Ensuring that assessments are undertaken when planned, and executed in accordance with agreed performance standards and targets. - Liaising with service providers about the practical arrangements required to carry out observations and assessments and checking that they understand the quality assessment process, and providing briefing sessions as appropriate - Travelling to service providers where observations and assessments are required - Collation and writing up the results of the observations and assessments in an agreed form - Taking into account all background information about the service providers' client service delivery work - Confirming the reliability of service providers self assessments of the quality of client service delivery - Making recommendations to improve the quality of client service delivery to individual service providers as appropriate, and identify good practice, where applicable - Reporting the results of observations and assessments in an agreed format, and within set timescales, to the service provider and relevant Citizens Advice Managers - Disseminating hard and soft intelligence to relevant Citizens Advice teams - Informing service providers about errors/omissions on particular cases identified in the course of the observation or assessment where action is required as a matter of urgency - Leading and contributing to consistency 	
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	<p>sessions, enabling all service providers to engage effectively</p> <p>Ensure strategy for quality assuring Citizens Advice branded client service delivery is fully integrated across relevant work plans and the Citizens Advice Service.</p> <p>Contribute to the evaluation of all quality assurance of Citizens Advice branded client service delivery projects and implement lessons learned in future work.</p> <p>Ensure that work undertaken reflects and supports the service's Equality and Diversity Strategy</p>	
<p>Develop and implement best practice systems and processes</p>	<p>Keep up to date on best practice systems and processes in quality assurance of client service delivery to ensure that the Citizens Advice Service is ready to take advantage of opportunities.</p> <p>Use and implement best practice systems and processes across the department to ensure that the Citizens Advice service quality assurance of client service delivery is effective and continuously improving.</p> <p>Maintain all systems and processes for quality monitoring to ensure effective and consistent quality monitoring of all Citizens Advice branded client service delivery.</p>	<p>10</p>
<p>Maintain expertise and insight</p>	<p>Manage your own day to day activities to deliver tasks on time and to the required standard while gaining experience and expertise in quality monitoring of client service delivery</p> <p>Proactive in identifying external and internal contacts within quality assurance of client service delivery</p> <p>Advise managers on recent developments in field of work.</p>	<p>10</p>

	Undertake research and analysis in field of work.	
Contribute to team	<p>Be an active member of department, identifying opportunities for your own development.</p> <p>Contribute to the good and efficient working of the department in delivering against the business plan.</p> <p>Coaching or buddying junior members of the Quality Assessor team</p> <p>Compliance with Citizens Advice policies and procedures, including health and safety</p>	10
Finance	<p>Monitor and challenge spend on projects/day to day activities.</p> <p>Demonstrate financial efficiency and value for money throughout work.</p>	5
Other	Undertake any other duties as may be reasonably required within the scope of the role.	5

Person specification

ESSENTIAL (to be assessed at application and interview):

1. Broad knowledge of the practical application of pensions law and personal and occupational pension arrangements.
2. Numerical skills to understand financial matters with a proven ability to supervise monitor and check information including statistics and calculations.
3. Effective communication skills both verbally and in writing with the ability to write effective reports and documents including providing developmental feedback using proven influencing and negotiating skills.
4. Ability or knowledge of the process of giving guided information and advice and how the quality of that information can be assured, whilst identifying issues and suggesting solutions.

ESSENTIAL: (to be assessed at interview)

5. Understanding and appreciation of wider retirement issues including those affecting society, and the advice needs of different populations e.g. older people; disabled people; minority ethnic populations; rural and inner city areas
6. Ability to work both as part of a team and under their own initiative, whilst providing innovative or insightful suggestions.
7. Ability to plan and prioritise own work, within a pressurised environment.
8. Ability to be able to maintain casework systems and procedures including the incorporation of common standards and principles.

Desirable

1. Proven ability in generalist advice and casework across the following topics: consumer; money advice; welfare benefits; discrimination; employment; housing; family; taxes; immigration; health; and education.

REQUIREMENTS FOR ROLE (candidates will confirm at interview)

- A track record of commitment to equity and the positive value of diversity and a good, up to date understanding of equity, diversity and inclusion and its application to service delivery in the charity sector.
- Ability to commit to and work within the values, aims, principles and policies of the Citizens Advice service in which equity and diversity is embedded throughout.
- A proven commitment to continuous professional development of self and wider teams.
- Willingness and ability to work unsocial hours on occasion and undertake travel throughout the UK with overnight stays.
- Proven ability to keep up to date with technology and take individual responsibility for learning new technologies.

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: https://www.citizensadvice.org.uk/about-us/job-and-voluntary-opportunities/citizens-advice-job-opportunities/citizens-advice-staff-benefits/](https://www.citizensadvice.org.uk/about-us/job-and-voluntary-opportunities/citizens-advice-job-opportunities/citizens-advice-staff-benefits/)



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:](https://www.citizensadvice.org.uk/about-us/job-and-voluntary-opportunities/citizens-advice-job-opportunities/guaranteed-interview-scheme/)
<https://www.citizensadvice.org.uk/about-us/job-and-voluntary-opportunities/citizens-advice-job-opportunities/guaranteed-interview-scheme/>
- **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:](https://www.gov.uk/guidance/disability-confident-how-to-sign-up-to-the-employer-scheme)
<https://www.gov.uk/guidance/disability-confident-how-to-sign-up-to-the-employer-scheme>
- **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:](https://www.citizensadvice.org.uk/about-us/about-us1/equality-and-the-citizens-advice-service/equality-and-diversity-forum/) <https://www.citizensadvice.org.uk/about-us/about-us1/equality-and-the-citizens-advice-service/equality-and-diversity-forum/>

Our commitment to equality runs through everything we do - read our [Future of Advice Strategic framework](https://www.citizensadvice.org.uk/about-us/about-us1/future-of-advice-our-strategic-framework-2019-22/) to find out more:

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