



# Performance Assessor 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
- Our approach to equality and diversity
- The benefits of working at Citizens Advice

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

If you want to chat about the role further, you can contact Rachel Irvine, Performance Manager by emailing [rachel.irvine@citizensadvice.org.uk](mailto:rachel.irvine@citizensadvice.org.uk) or calling 07726 902 666.

# 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 5 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

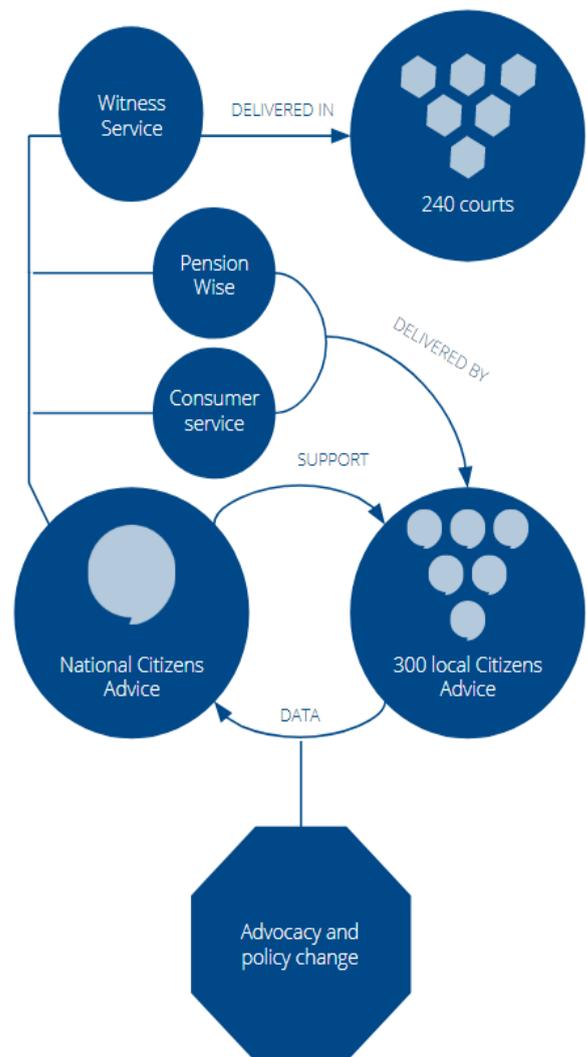
Our network members are all independent charities, delivering services from:

- 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 Membership Assurance and Compliance team. Here are 3 ways you can find out more about us:

1. Annual report - <https://www.citizensadvice.org.uk/Global/CitizensAdvice/Governance/Annual%20Report-2019-20.pdf>
2. **[Citizens Advice - for everyone, for 80 years:](https://wearecitizensadvice.org.uk/for-everyone-for-80-years-98601c688814)**  
<https://wearecitizensadvice.org.uk/for-everyone-for-80-years-98601c688814>
3. **[Beyond the job pack: 4 staff describe what it's like to work at Citizens Advice:](https://wearecitizensadvice.org.uk/beyond-the-job-pack-305976d4b8d7)**  
<https://wearecitizensadvice.org.uk/beyond-the-job-pack-305976d4b8d7>



## The role

We have a secondment opportunity until 28 October 2022 to join the Performance team as a Performance Assessor.

You'll work with stakeholders to deliver leadership self assessment verifications with rigour and a proportionate approach in line with external quality standards and the membership package. You'll be familiar with evaluating evidence against criteria and presenting outcomes effectively. In an exciting year as we review our standard, we're looking for a colleague who's passionate about continuous improvement in their own practice and in local office performance.

This role sits within the Membership, Assurance and Compliance team, which forms part of Network Strategy and Standards directorate. Our function is to ensure that our local Citizens Advice members understand and comply with key legal and regulatory requirements of operating as independent charities and the membership requirements for working as part of Citizens Advice.

The Performance team objectives for 2021/2022 are:

- Delivering the Leadership Self Assessment, including providing support and subject matter expertise.
- Ensuring the ongoing relevance of the Leadership Self Assessment process in context of the other local Performance Quality Framework components and network service delivery challenges.
- Maintaining accreditation of the local Performance Quality Framework to relevant external quality standards.

## Role profile

<b>Band:</b>	Senior Officer Upper	
<b>Reporting to:</b>	Performance Manager	
<b>Proficient salary:</b>	£41, 812	
<b>Location:</b>	Flexible	<b>Travel H/M/L: H</b>
<b>Role purpose:</b>	To ensure the maintenance of high quality service provision and the safeguarding of the Citizens Advice brand by undertaking the quality assurance and compliance assessment of all Citizens Advice branded local Citizens Advice and consortia.	
<b>Key accountabilities</b>	<b>Key elements/Tasks</b>	<b>% of Time</b>
<b>Plan and deliver individual strategic projects /business plan objectives relating to quality assurance and performance assessment of all Citizens Advice branded local Citizens Advice and consortia</b>	<p>Working with all teams in the Operations Division, the Local Finance Support team and other teams within Citizens Advice as required, deliver the following business plan objectives:</p> <ul style="list-style-type: none"> <li>- take ownership of the performance assessment process</li> <li>- enable local offices to meet all minimum quality standard KPIs for organisational leadership and advice delivery</li> <li>- equip local offices with the knowhow and resources to self-manage and improve their performance and enhance their competitive edge</li> </ul>	70

- contribute subject matter expertise and data to support the achievement of organisational priorities
- maximise efficiency and effectiveness and support team well being

Through the following tasks:

- Working independently and at pace, conducting verification assessments and re-verifications of Citizens Advice branded local Citizens Advice and consortia self-assessments of leadership performance.
- Making outcome decisions using triangulation methodology and applying a risk based approach, taking into account multiple complexities including organisational size, scope, maturity, risk factors and latest available performance data and all soft and hard intelligence in line with agreed guidelines, performance standards and targets.
- Taking responsibility for planning the LSA timetable, including managing conflicts of interest and influencing under-engaged member organisations, ensuring that verification assessments are undertaken when planned or that alternative arrangements are agreed taking account of the strategic context of organisations and in line with external accreditation timescales.
- Liaising with Citizens Advice branded local Citizens Advice and consortia about the practical arrangements required to carry out verification assessments, ensuring that they understand the assessment process.
- Using technical knowledge of governance, strategic planning, financial management, risk management, people and operational management, partnership working, equality leadership, legal and regulatory compliance and client service delivery, taking into account all background information and hard and soft intelligence about the Citizens Advice branded local Citizens Advice and consortia to provide independent, risk based, well informed and

	<p>balanced verification assessments reflecting the strategic context of Citizens Advice branded local Citizens Advice and consortia.</p> <ul style="list-style-type: none"> <li>● Determining the reliability of all Citizens Advice branded local Citizens Advice and consortia self-assessments.</li> <li>● Identifying areas of good practice and areas requiring improvement by individual service providers, making proportionate directions for achieving required improvement and/or recommendations for continuous improvement taking into account the strategic and operational context of the member organisation.</li> <li>● Influencing and engaging local leaders and providing coaching support to chief officers and chairs as appropriate, taking into account the strategic and operational context of the member organisation.</li> <li>● Referring underperforming organisations to relevant colleagues in Citizens Advice, reverifying corrective action facilitated by colleagues, communicating and reporting updated outcomes as appropriate.</li> <li>● Accurately collating, writing up and communicating the results of assessment, reverifications and reviews within set timescales, to local Citizens Advice and consortia and relevant colleagues in Citizens Advice in an agreed form and in line with house style, reflecting member performance against required standards and with reference to strategic context.</li> <li>● Collecting and disseminating hard and soft intelligence to relevant colleagues in Citizens Advice in line with internal information sharing protocols.</li> <li>● Contributing to the delivery of reports to Membership and Performance Adjudication Panel to agreed timelines and appropriate quality standards.</li> <li>● Providing subject matter expertise to Citizens Advice colleagues and local offices on the application of internal and external standards as they relate to the operation, reputation and sustainability of Citizens Advice branded local Citizens Advice and consortia.</li> </ul>	
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	<ul style="list-style-type: none"> <li>Ensuring that the work of the team reflects and supports organisational EDI goals.</li> </ul>	
<p><b>Develop and implement best practice systems and processes</b></p>	<p>Own, develop, implement and maintain best practice systems and processes across the team to ensure that Citizens Advice performance assessments of all Citizens Advice branded local Citizens Advice and consortia are consistent, effective and continuously improving.</p> <p>Contribute to the evaluation of quality assurance and performance assessment including analysis of feedback and reviews of LPQF and implement lessons learned in future work.</p> <p>Proactively participate in and contribute to ongoing consistency and continuous improvement activities including discussion, observations, peer support (giving and receiving) and gathering feedback, to ensure consistency of performance assessments of all Citizens Advice branded local Citizens Advice and consortia.</p> <p>Develop or support the development and / or updating of specialist subject matter content for the Citizens Advice intranet including Workplace.</p> <p>Develop and deliver briefings, workshops or other development activities to peers and Citizens Advice branded local Citizens Advice and consortia as appropriate.</p>	<p>15</p>
<p><b>Maintain and develop expertise and insight</b></p>	<p>Be proactive in identifying and fostering external and internal contacts, influencing stakeholders and reflecting quality assurance and compliance assessment reflecting the strategic context in which Citizens Advice branded local Citizens Advice and consortia operate to ensure consistency and collaborative working.</p> <p>Maintain up to date knowledge of best practice in governance, strategic planning, financial management, risk management, people and</p>	<p>5</p>

	<p>operational management, partnership working, equality leadership, legal and regulatory compliance and client service delivery. Advise managers on recent developments in the field of work.</p> <p>Undertake research and analysis in quality assurance and compliance, using outcomes to drive continuous improvement.</p> <p>Keep up to date on best practice systems and processes in quality assurance and performance assessment to ensure that the Citizens Advice Service is ready to take advantage of opportunities.</p>	
<b>Contribute to team development</b>	<p>Being an active member of the team, identifying opportunities for your own development.</p> <p>Completion of mandatory Citizens Advice training including annual GDPR assessment.</p> <p>Compliance with Citizens Advice policies and procedures, including health and safety.</p> <p>Peer supporting colleagues.</p>	5
<b>Other</b>	<p>Undertake any other duties as may be reasonably required within the scope of the role.</p> <p>Monitor and challenge spend on projects/day to day activities.</p> <p>Demonstrate financial efficiency and value for money throughout work.</p>	5



## Person specification

### Essential Criteria:

1. Proven ability to assess performance and compliance against set indicators, standards and criteria using a triangulation methodology in an objective and evidence based way prioritising organisational key risks across a range of subject areas including; governance, strategic planning,

financial management, risk management, people and operational management, equality, legal and regulatory compliance.

2. Proven ability to analyse and interpret high volumes of complex information and data, from multiple sources at pace, prioritise key strategic risks, identify patterns, trends and inconsistencies and draw logical and clear conclusions.

3. Proven ability to work autonomously when required, deal with complex issues and problems, make judgements and persuasively recommend well thought out courses of action which address the causes of underperformance.

4. Proven ability to analyse and understand the policies, structures, and practices of an organisation, and prioritise how these influence their performance, quality and standards of service provision.

5. Proven ability to use own judgement, win the respect of others, and establish credibility, influencing and negotiating with senior stakeholders who have a diverse range of skills and experience.

6. Proven ability to plan, prioritise effectively and work with accuracy within a deadline driven environment and achieve results.

7. Excellent verbal and written communication skills including the ability to write effective reports, and to convey complex information clearly and accessibly.

8. Ability to work as part of a team, working in a consistent way with common standards and principles.

9. Understanding of and commitment to equality and equity and the positive value of diversity in relation to the delivery of a quality assurance and performance assessment service.

10. Commitment to reflect our organisational values at work by being purpose-driven, people focused, collaborative and transparent.

### **Requirements for the role:**

- 11 Proven ability to use Google 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 in line with data protection principles.
- 12 Willingness to travel regularly within the UK (including overnights) and to work unsocial hours occasionally to meet tight timescales.

- 13 Understanding of, and commitment to, the aims and principles of the Citizens Advice Service in which equality, equity and diversity are embedded throughout.
- 14 Awareness that Citizens Advice clients are at the heart of everything we do.



## Terms and conditions

### 1. PROFICIENT SALARY:

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.

## **13. LOCATION**

As advertised

#### **14. EMPLOYMENT STATUS**

As advertised

#### **15. 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.

#### **16. 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 them. As well as a generous annual leave entitlement 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-ou) to find out more:  
<https://www.citizensadvice.org.uk/about-us/about-us1/future-of-advice-ou>

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