**Job pack**

**Assessor - Utilities**

Thanks for your interest in working at Citizens Advice Plymouth. 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 Plymouth.

**In this pack you’ll find:**

* Information about the organisation, team and role
* What we are looking for (person specification)
* Our aims, principles, values and behaviours
* Application guidance notes
* **Application form**
* **Equal opportunities monitoring form**
* 3 things to know about us & the impact of Citizens Advice Plymouth
* What it’s like to work at Citizens Advice Plymouth
* Our approach to equality, diversity and inclusion

**If you want to chat about this role contact:**

* Sarah Quintero. **Email:** sarah.quintero@citizensadviceplymouth.org.uk

**To apply:**

* Please complete the application form in full.
* Completed applications should be returned to: recruitment@citizensadviceplymouth.org.uk
* Please attach your application as a Word or PDF document (not a link).

**Closing date: Friday 10th October 2025 at 9am**

Please note:

(1) We do not accept CVs. (2) We reserve the right to withdraw a vacancy at any time.

 **The team**

The assessor team are the first point of contact for utility customers referred to Citizens Advice by their utility provider.

We are recruiting for four assessors to join our assessor team, supporting customers, and working alongside our existing administrators, advisers and caseworkers. The assessor team is part of the wider Utilities department where we are currently a department of 82 people across five energy projects

The wider organisation includes around 180 staff, 40 volunteers, and 23-line managers.

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**The role**

### We support a wide range of people to find a solution for their debt circumstances. It’s the Assessor’s role to manage the referral and contact clients by phone, email, or webchat as first contact with the service. An Assessor is there to establish what the client needs and plays a vital role in the client experience as the first contact people have with us. You will complete initial assessments with clients as well as following up on their experience with us.

An Assessor must ensure that all relevant information is collected efficiently and accurately. We aim to progress the client’s referral as far as we possibly can on the initial contact and minimise the number of times they need to contact us. This is achieved by completing in depth exploration and providing tailored information where appropriate and booking in with either a Debt Adviser or Caseworker for an appointment if needed.

**This role is fully telephone based, with a mix of office and remote working.** It can sometimes be a challenging role, but you will be fully trained and supported, working as a part of an approachable and supportive team in a rewarding environment to provide the best possible service to people across England, Wales, and Scotland.

### The employer for this post is Citizens Advice Plymouth. The role is 37 hours a week (9-5 Monday-Thursday and 9-4:30 on Fridays) on a permanent basis. Part-time hours will be considered.

**The start date for this role will be Tuesday 18th November 2025,** with interviews on 16th & 17th October 2025.

**Full training will be provided.**During your initial classroom and on-the-job training, you will be based at our city centre office at Cobourg House. You will continue to work from the office until you have successfully completed your probation period. Once probation is passed, the role will move to a hybrid working pattern, with a minimum of 8 days per month in the office at Cobourg House, 32 Mayflower Street, Plymouth. You must be able to attend the office as requested, including at short notice if required. Please note that annual leave will not be approved during the first 5 weeks of training.

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**Who we’re looking for**

The successful candidates will need excellent customer service and IT skills and be confident in using the telephone to assess complex issues. You will be resilient and able to assess people’s problems sensitively and compassionately through the phone, webchat and email referral pathways.

You will be comfortable managing and supporting others during times of crisis, including clients who may be suicidal, and you will be able to manage difficult and emotional conversations well. Excellent communication skills, both written and verbal, are essential, as is the ability to effectively communicate with our clients with a non-judgmental approach.

You will be able to competently use a range of Office 365 programs and keep case recording systems up to date accurately while still communicating with your client accessing the service. You will also have excellent organisational skills to be able to prioritise your workload well to achieve performance-related objectives.

You will have good boundaries and understand the importance of confidentiality in our work and be able to maintain this. You should enjoy working as part of a busy, motivated, and supportive team and be able to adapt well to changing priorities. You will be flexible to support the service where needed at short notice to cover absence and other projects in the department.

We value diversity, promote equality and challenge discrimination. We encourage and welcome applications from suitably skilled candidates from all backgrounds. We particularly welcome applications from candidates who are disabled, or people from Black, Asian, and other racially minoritised backgrounds, as these people are currently underrepresented at Citizens Advice Plymouth. We also actively welcome applications from LGBTQ+ candidates.

You will thrive on working with a diverse range of people and be open-minded, approachable, and non-judgmental. You will take an empathetic and compassionate approach to clients to find solutions to the problems they are facing.

# Role Profile

|  |  |
| --- | --- |
| Job title | Assessor – Utilities |
| Reporting to | Managers – Utilities |
| Responsible for | No line management responsibility  |
| Starting salary | £24,242.40 per annum |
| Salary scale | £24,242.40 - ​£24,915.80 - ​£25,493.00 per annum |
| Hours | 37 hours a week 9am to 5pm Monday to Thursday and 9am to 4:30pm on Fridays |
| Contract | Permanent |
| Work base | Hybrid work pattern with a mixture of office (Cobourg House, Plymouth) and home working once you have passed probation. Full-time office working is available if needed.  |
| Main responsibility | **Details**  | % of time |
| Completing telephone assessments through our database or national helpline.  | * Work on a rota basis to ensure initial assessments are completed through different referral pathways, including:
	+ Inbound calls through our National Helpline
	+ Making outbound calls from our referrals database and call back lists.
	+ Talking to clients through the webchat service
	+ The online appointment booking form.
* Assess clients using sensitive questioning skills to allow them to explain their problem(s).
* Identify key information about the issue raised, including any emergencies, key dates, and capabilities.
* Triage clients to determine if they need an appointment with an adviser.
* Assess and agree the appropriate level of service, taking into consideration the client’s ability to take the next step themselves, the complexity of the problem and the resources of the project.
* Refer and/or signpost to other specialist agencies within and outside the Citizens Advice Network if the situation falls outside of the contract’s remit.
* Adhere to processes and procedures to ensure that information and expectations of the fund is discussed at the time of appointment booking.
* Maintain accurate case records for audit purposes, information retrieval, statistical monitoring, and report preparation.
* Correctly record tags, funders and Advice Issue Codes (AICs) relating to funding requirements, maintain record keeping following templates and guidance provided in line with our process.
* Ensure timely uploading of case notes to case recording system and notes are a true reflection of client contact.
 | 75% |
| **Follow up phone calls** | * Work on a rota basis as part of the team to evaluate the effectiveness of the service through client feedback.
* Contact the client 3 months after their case has been closed to check on their progress and update any financial outcomes.
* Ask client for specific feedback using set questions.
* Update the follow up spreadsheet after each contact.
* Record all successful contact on the Casebook system and update all outcomes as appropriate.
 | 10% |
| **Social policy** | * Write up case studies from clients to support our work on local and national campaigns for change.
* Spot potential areas for campaigns and feed into the Research & Campaigns department.
* Write up evidence forms to support our work on local and national campaigns for change.
* Talk to clients with appropriate cases about whether they are willing to speak to the media or complete surveys.
* Explain our campaigning role to clients.
 | 5% |
| **General administrative duties** | * Provide administrative support to the department when required.
 | 10% |
| You are also expected to:* Attend relevant internal and external meetings as agreed with your line manager
* Take personal responsibility for your own actions and for sorting out issues or problems that arise.
* Review and make recommendations for improvements to the service.
* Demonstrate commitment to the aims and policies of the Citizens Advice service.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
* Comply with all Citizens Advice information assurance guidelines.
* Carry out any other tasks that may be within the scope of the role to ensure the effective delivery and development of the service.
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*A 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.*

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# Person specification

**Essential criteria**

**Top 6 essential criteria to be assessed at application stage. The rest will be assessed during interviews and interview tasks.**

1. Experience of or ability to interview clients using sensitive listening and questioning skills to get to the root of the issues and empower clients, whilst maintaining structure and control of assessments.
2. Excellent written and oral communication skills, by phone, email, webchat and letter to research, assess and understand information to tailor it in a way that meets the needs of clients.
3. Able to maintain boundaries and keep confidentiality.
4. Ability to be flexible and work as part of a busy team communicating clearly to complete tasks to achieve both team and individual goals and deadlines.
5. Ability to maintain efficient administration systems with attention to detail and demonstrable ability to maintain accurate, up to date records.
6. The resilience to deal with difficult situations and clients who are victims of domestic violence or have expressed suicidal thoughts using sensitive listening and questioning skills whilst maintaining structure and control of the assessment.
7. Excellent IT skills with good working knowledge of Microsoft Office 365, including Word, Excel and Outlook.
8. Understanding of and commitment to the aims, principles, values and behaviour framework of Citizens Advice Plymouth, including our equity, diversity and inclusion strategy.

**Our aims, principles, values &** **behaviours**

**Our aims**

* To provide the advice people need for the problems they face.
* To improve the policies and practices that affect people's lives.

**Our principles**

* We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities.
* We value diversity, promote equality and challenge discrimination.

**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’re open and honest and we 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.

**Our Behaviour Framework**

1. A commitment to the aims and principles of the Citizens Advice service in everything we do.
2. A passion for encouraging open debate to resolve issues to improve our services to clients.
3. To be open and transparent, with a commitment to following through on agreed actions.
4. To be a positive role model, bringing enthusiasm and a “can do” attitude into the working environment.
5. Admit to, be tolerant of, and learn from mistakes; they will happen, but repeated mistakes are a problem that need sorting.
6. Respectful & professional in all interactions with clients, colleagues & external stakeholders.
7. A commitment to teamwork, whilst recognising individual accountability.
8. To communicate effectively: ensuring that information and knowledge is shared across the organisation.
9. Ensure meetings are decision and/or idea focused with clear outcomes and/or solutions.
10. A passion for health, safety, wellbeing, and the environment underpinned by our policies.

While we remain **legal, ethical and credible**

**Guidance notes for applicants**

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| Shortlisting for interview for this role will be made based on the information that you have provided on your application form.The notes below are designed to help you make the best of your application and help us process it efficiently.Please read the guidance notes before completing your application form. |

1. The application form plays a key part in our recruitment and selection process, and we use the information you provide about your skills and experience to assess your suitability for the role.
2. It is important that you complete the application form as fully and accurately as possible, please read the job description and person specification fully.
3. Read the advert, job description and person specification to help you think about the job and what skills, qualifications and experiences you have which will be relevant. Do not forget those you have gained outside of employment, e.g. social and community activities or domestic responsibilities. Make sure that you draw our attention to them and show how they are relevant on the ‘Information, Experience, Knowledge’ section of the application form.
4. **Person specification - information, experience, knowledge, skills and abilities: -**
5. This is a key section of our application form 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.
6. **Selection is based on an assessment of the evidence you provide against the requirements of the role as set out in the person specification.**
7. You should explain how your ability, skills and knowledge match those required in the first five points of the person specification.
8. It is important that you tailor your response to clearly demonstrate how you meet each requirement. No assumptions will be made about your achievements and abilities.
9. In addition, please also provide a specific example for each point in the person specification. You should choose examples of experience that clearly demonstrate what we are looking for and be precise about what you did and how you did it, the outcome and the result of your actions.

A useful guide for providing examples, may be the S.T.A.R, format.

* + - **Specific** – give a specific example
		- **Task** – briefly describe the task/objective/problem
		- **Action** – tell us what you did
		- **Results** – describe what results were achieved

Please provide recent work examples wherever possible. However, do remember that relevant examples from other aspects of your life, for example: voluntary or unpaid work, school or college work, family, or home responsibilities, can also be given.

1. Please complete your application and return it by e-mail (as a Word document) no later than the closing date/time referred to in the advert. If you return your application via e-mail, there is no requirement to send a hard copy.
2. We don’t accept CVs instead of a completed application form unless specifically stated in the advert.

**Disability**

Please let us know if you require any adjustments to be made to the application process or would like to provide any information you wish us to take into account when we are considering your application. If you are selected for interview, we will ask you to let us know if you have any access needs or may require reasonable adjustments to the interview or assessment (if applicable) at that stage. Please be assured that we will be supportive in discussing reasonable adjustments with you at any stage of the recruitment and selection process.

**Diversity Monitoring**

Citizens Advice Plymouth recognises the positive value of diversity, promotes equality and challenges discrimination. We welcome and encourage job applications from people of all backgrounds.

Monitoring recruitment and selection procedures is one way of helping us to ensure that there is no unfair discrimination in the way that we recruit people. To do this, we need to know about the diversity profile of people who apply for posts at Citizens Advice Plymouth. This information is given in confidence for monitoring purposes only and is not seen by anyone responsible for making recruitment decisions. However, if you would prefer not to answer any of the questions we ask, please leave them blank.

# Shortlisting outcomes

Applicants must reach a shortlisting score of 60% (as a minimum) to be invited for an interview and must reach a score of 70% (as a minimum) at interview and in any assessment to be appointed. Some positions may require additional assessments (practical task/test or assessment centre). If this is the case, further details will be provided if you are shortlisted.

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| **CONFIDENTIAL APPLICATION FORM**Logo**Section 1****Please return applications by email to:** recruitment@CitizensAdvicePlymouth.org.uk **If posting, please send to:**HR Team, Citizens Advice Plymouth, Floor 3, Cobourg House, 32 Mayflower Street,PlymouthPL1 1QX |
| Please refer to the Guidance Notes for Applicants above before completing this application form.We value diversity, promote equality and challenge discrimination. We encourage and welcome applications from suitably skilled candidates from all backgrounds.  Members of the recruitment panel will consider information you provide against the person specification for the role to decide whether you will be shortlisted for an interview. It is therefore essential that you complete the form fully and that you clearly demonstrate how you meet each point on the person specification. If you do not complete the person specification section, you will not be shortlisted. Please note that CVs are not accepted.

|  |  |
| --- | --- |
| Candidate reference no (for office use only): |  |
| **Role applied for** |
| Job Title: | Assessor – Utilities |
| Location: | Plymouth PL1 1QX | Job Reference: | 2526 013 |

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| --- | --- |
| We will normally contact you by email. However, if you would prefer to be contacted by another method, please write this here.  |  |

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**Personal information and address for correspondence**

|  |  |
| --- | --- |
| First name(s) |  |
| Last name(s) |  |
| Pronouns e.g. she/her, he/him, they/them |  |
| Address |  |
| Postcode |  |
| Personal email |  |
| Mobile |  |
| Telephone home |  |
| May we contact you at work?  |  |

**Entitlement to work in the UK**

To take up this post you must have the right to work in the UK.

Please note that Citizens Advice Plymouth does not hold a sponsor licence and therefore cannot issue certificates of sponsorship under the points-based system.

**References**

* Please provide the names, addresses, telephone numbers and email addresses of two people who may be approached for references. **One of these should be your present or most recent employer.**
* References will only be taken up for successful candidates following the interview.
* **If you are an internal applicant**, please add your current line manager as a referee.
* The other referee could besomeone who knows you in a work-related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the post applied for.

All job offers are subject to receipt of two satisfactory references. These must be received before the first day of employment.

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| **Referee 1** |
| Name |  |
| Company Name |  |
| Address incl. postcode |  |
| Telephone |  |
| Email |  |
| In what context does this referee know you? |  |
| **Referee 2** |
| Name |  |
| Company Name |  |
| Address incl. postcode |  |
| Telephone |  |
| Email |  |
| In what context does this referee know you? |  |

If I am successful in my application for employment, I authorise Citizens Advice Plymouth to contact my referees named above for a reference.

|  |  |  |  |
| --- | --- | --- | --- |
| **Signed:** |  | **Date:** |  |

**Section 2**

**Information, experience, knowledge, skills**

**Important Information**

**It is essential that you complete this section in full.**

**Please refer to section 4 of the guidance notes for further details.**

* Please explain and demonstrate how you meet the essential criteria outlined in the person specification element of the job description.
* Please ensure that you address each of the first 6 criteria on the person specification, using the same order.
* Provide examples to support your explanations.
* Your application will be scored on your answers to how you meet the person specification. Not completing the section below will mean that you will not shortlist for the role.

**Person specification**

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| 1. **Experience of, or ability, to interview clients using sensitive listening and questioning skills to get to the root of the issues and empower clients, whilst maintaining structure and control of assessments.**
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| 1. **Excellent written and oral communication skills, by phone, email, webchat, and letter, to research, assess, and understand information to tailor it in a way that meets the needs of clients.**
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| 1. **Able to maintain boundaries and keep confidentiality.**
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| 1. **Ability to be flexible and work as part of a busy team communicating clearly to complete tasks to achieve both team and individual goals and deadlines.**
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| 1. **Ability to maintain efficient administration systems with attention to detail and demonstrate ability to maintain accurate, up to date records.**
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| 1. **The resilience to deal with difficult situations and clients who are victims of domestic violence or have expressed suicidal thoughts using sensitive listening and questioning skills whilst maintaining structure and control of the assessment.**
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**Career History**

* Please include your current / previous employment (including job training schemes), voluntary work, community activities, school placements, time caring for dependents etc.
* Please put in date order, starting with the most recent.
* Please ensure that you fully complete for all roles and include any gaps for career breaks**.** (Continue on a separate sheet if necessary).

|  |  |
| --- | --- |
| **Name of employer:** |  |
| **Address:** |  |
| **Postcode:** |  |
| **Position held:** |  |
| **Employment dates (to / from):** |  |
| **Reason for leaving:** |  |

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| **Summary of the nature of your role, and responsibilities:** |
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| --- | --- |
| **Name of employer:** |  |
| **Address:** |  |
| **Postcode:** |  |
| **Position held:** |  |
| **Employment dates (to / from):** |  |
| **Reason for leaving:** |  |

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| --- |
| **Summary of the nature of your role, and responsibilities:** |
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| --- | --- |
| **Name of employer:** |  |
| **Address:** |  |
| **Postcode:** |  |
| **Position held:** |  |
| **Employment dates (to / from):** |  |
| **Reason for leaving:** |  |

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| **Summary of the nature of your role, and responsibilities:** |
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| --- | --- |
| **Name of employer:** |  |
| **Address:** |  |
| **Postcode:** |  |
| **Position held:** |  |
| **Employment dates (to / from):** |  |
| **Reason for leaving:** |  |

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| **Summary of the nature of your role, and responsibilities:** |
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| --- | --- |
| **Name of employer:** |  |
| **Address:** |  |
| **Postcode:** |  |
| **Position held:** |  |
| **Employment dates (to / from):** |  |
| **Reason for leaving:** |  |

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| **Summary of the nature of your role, and responsibilities:** |
|  |

* **If you have worked or volunteered at Citizens Advice within the last 5 years, please provide further details below.**
* **References will be taken up for successful candidates**

|  |  |
| --- | --- |
| Name of employer: |  |
| Address: |  |
| Postcode: |  |
| Position held: |  |
| Managers and contact details: |  |
| Employment dates (to / from): |  |
| Reason for leaving: |  |

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| **Summary of the nature of your role, and responsibilities:** |
|  |

**Education History**

Please give details of qualifications you have obtained from school, college, or university. If these are from a country outside of the UK, please state what level these are equivalent to in the English school system (e.g. Bachillerato – equivalent to A Levels)

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| --- | --- | --- |
| **Subject** | **Level** | **Grade** |
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**Professional development**

Please give details of any professional qualifications including membership of any professional bodies and any job-related training that you may have undertaken:

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|  |

**Advice**

|  |  |
| --- | --- |
| Have you received advice from Citizens Advice Plymouth within the last 3 months | **YES / NO** |
| Having received advice from Citizens Advice Plymouth will not affect your application, all shortlisted applicants will be checked against our advice database to confirm your case record has been closed for 3 months before employment would commence. |

**Criminal Convictions**

Having a criminal record will not necessarily bar you from working for Citizens Advice Plymouth – much will depend on the type of job you have applied for and the background and circumstances of your offence. For some posts, an offer of employment will be subject to a Disclosure and Baring Service (DBS) check. If this applies to the post for which you are applying, this will be noted in the application pack. Please see Guidance Notes and Application Pack for further details.

|  |  |
| --- | --- |
| Have you had any previous convictions not regarded as spent under the Rehabilitation of Offenders Act 1974? | **Yes / No** |

**If yes, please provide details of the offence and the date of conviction. This will not be shared with the interview panel:**

|  |
| --- |
|  |

**Attachments**

|  |  |
| --- | --- |
| * Have you attached any separate sheets or documents?
 |  |
| * If yes, how many
 |  |

**A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Immigration, Asylum and Nationality Act 2006. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made.**

**Section 3**

**Diversity Monitoring**

Please note this section will be detached before sending your application to the recruitment panel for shortlisting.

|  |  |
| --- | --- |
| Job Title: | **Assessor – Utilities** |
| Job Reference No | **2526 013** |
| Candidate Reference No (office use only) |  |

The Citizens Advice service is committed to valuing diversity and promoting equality. We encourage and welcome applications from suitably qualified candidates from all backgrounds regardless of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, or sexual orientation.

To achieve these aims we need to know about the diversity of people who apply to work in the service. Please help us by providing the information requested in the form below

**Data Protection Overview**

If you are happy to provide it, we will use this information for the sole purpose of allowing us to monitor equality of opportunity and treatment as necessary to maintain or promote equality within Citizens Advice Plymouth.

The information you give us will be kept securely, won't be shared outside the service and is confidential.

It will not be seen by anyone responsible for making recruitment decisions or have any impact on you directly.

If you are successful in your application and we require this information for other purposes, you will be asked to provide it separately - i.e. this form will not be used for other purposes.

If you would prefer not to answer any of the questions we ask, please leave them blank. If you would like us to stop using the information you provide, please contact us. Thank you for your co-operation.

**The following information will not be seen by the recruitment panel and will not affect your application**

**Age**Which age bracket do you fit into? Put a cross in the relevant box below.

|  |  |  |  |
| --- | --- | --- | --- |
| Under 25 |  | 25-34 |  |
| 35-44 |  | 45-54 |  |
| 55-64 |  | 65 and over |  |

**Gender**
What best describes your gender? Put a cross in the relevant box or write in a preferred term.

|  |  |  |
| --- | --- | --- |
| Female |  |  |
| Male |  |  |
| Non-binary |  |  |
| I prefer to use another term (please write in) |  |

**Sexual orientation**
What is your sexual orientation? Put a cross in the relevant box or write in a preferred term.

|  |  |  |  |
| --- | --- | --- | --- |
| Bisexual |  | Gay man |  |
| Gay woman / Lesbian |  | Heterosexual/straight |  |
| I prefer to use another term (please write in) |  |

**Ethnic origin**
How would you describe yourself? Choose **one** section (A to E) and put a cross in the relevant box within it.

We use the agreed ethnic group descriptions as used in the Census:

<https://www.ethnicity-facts-figures.service.gov.uk/style-guide/ethnic-groups>
We recognise that these ethnic groups do not represent how all people identify. You are encouraged to write in your ethnicity using your own words if you don’t identify with any groups in the list.

|  |  |  |
| --- | --- | --- |
| **A. Asian/Asian British** | Indian |  |
| Pakistani |  |
| Bangladeshi |  |
| Chinese |  |
| Any other Asian Background Please write in………………………………………. |  |

|  |  |  |
| --- | --- | --- |
| **B. Black/Black British/African/ Caribbean** | African |  |
| Caribbean |  |
| Other Black, Black British or Caribbean background Please write in………………………………………. |  |

|  |  |  |
| --- | --- | --- |
| **C. Mixed/multiple ethnic groups** | White & Black Caribbean |  |
| White & Black African |  |
| White & Asian |  |
| Any other mixed/multiple ethnic background Please write in………………………………………. |  |

|  |  |  |
| --- | --- | --- |
| **D. White** | English/Welsh/Scottish/Northern Irish/British |  |
| Irish |  |
| Gypsy or Irish Traveler |  |
| Roma |  |
| Any other white background Please write in………………………………………. |  |

|  |  |  |
| --- | --- | --- |
| **E. Another ethnic group** | Arab |  |
| Any other ethnic group Please write in………………………………………. |  |

**Disability**

A disabled person is defined under the Equality Act 2010 as someone with a ‘**physical or mental impairment which has a substantial and long-term adverse effect on that person’s ability to carry out normal day-to-day activities**.’ Long-term for the purposes of the act is 12 months or more.

**Do you consider yourself to be disabled under the Equality Act 2010?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  | No |  |

The information on this form is for monitoring purposes only. If you require any reasonable adjustments to be made in the recruitment process or at work subsequently if appointed, please make sure you tell us separately from this form. We follow the social model of disability which believes that it is the barriers created by society which disable people. We will use reasonable adjustments wherever possible to remove those barriers.

**Gender identity**

Is your gender identity the same as the gender you were assigned at birth? Put a cross in the relevant box.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  | No |  |

**Religion or belief**Which group below do you most identify with? Put a cross in the relevant box.

|  |  |
| --- | --- |
| No religion |  |
| Buddhist  |  |
| Christian (including all denominations) |  |
| Hindu |  |
| Jewish |  |
| Muslim  |  |
| Sikh |  |
| Any other religion or belief. Please write in………………………………………. |  |

**Where did you hear of this opportunity?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Citizens Advice Plymouth website  |   |   | Indeed  |   |
| National Citizens Advice website  |   |   | University Job Board  |   |
| Internal News Board/Email  |   |   | Charity Jobs  |   |
| Facebook  |   |   | Other – please state below  |   |
| Linkedin  |   |   |   |
| Word of mouth  |   |   |

**What date (approximately) did you first see the vacancy advertised?**

|  |
| --- |
|  |

**3 things to know about us**

**1.** **We’re local and we’re national.** The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members across England and Wales. Citizens Advice Plymouth is part of the network of local Citizens Advice members and offer free, confidential advice to everyone who lives, works and studies in Plymouth, as well as over the phone to clients across the country.

**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 network** delivers 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.

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**Terms and conditions**

**1. Starting salary**

As advertised. Appointment will usually be at the starting salary level. Moving up the salary scale is based on evidencing that you meet set competencies for the higher levels. We make sure our salaries are in line with the Real Living Wage and review them annually to account for cost-of-living increases.

**2. Annual leave**

We offer above the statutory annual leave – a total of **34.5** days for your first year (pro rata for part-time or starting mid-way through a year). This is made up of 25 days annual leave plus bank holidays and an additional 2.5 days over Christmas and New Year. Once you’ve been with us for a full year, you’re also entitled to an extra day’s holiday each year in the next year up to 5 additional days.

**3. Pension Scheme**

Citizens Advice Plymouth provides a Group Stakeholder scheme with a 4% employer contribution. Further details of this scheme will be provided to the successful applicant on starting with us.

**4. Death in Service benefit**

If the worst happens, we will provide 2 x your annual salary to your loved ones, as part of our death in service cover.

**5. Learning and Development**

Citizens Advice Plymouth has a coordinated staff and volunteer training and development strategy, with a dedicated Learning and Development team and access to a range of online courses to develop your skills, both on the job and transferable. 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.

**6. Salary Sacrifice Schemes**

Citizens Advice Plymouth offers a salary sacrifice pension, meaning you save 20% extra into your pension through tax relief. We also operates a Cycle to Work scheme which helps save you money on buying a bike and spread out the payments through your salary.

**7. Disclosure and Barring Service Checks (DBS)**

Some Citizens Advice Plymouth positions may require the successful candidate to undergo a DBS check. DBS checks are only requested where proportionate and relevant to the post concerned. This will be made clear in the Role Profile.

**8. Equality, diversity and inclusion**

Citizens Advice Plymouth 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 Plymouth will not discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, trans status, 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 Plymouth is committed to providing a culture in which all staff and volunteers value each other and can 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 and volunteers are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles.

All staff and volunteers 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**

All new starters will have 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 Plymouth’s discretion in exceptional circumstances, an extension of the probationary period by a specified period of time. Internal staff must complete the probation period within their current role before applying for other roles within the organisation.

**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 misunderstanding or 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. We have an office in Plymouth city centre (Cobourg House, Mayflower Street), which is easily accessible from Plymouth railway station and bus stops. We also have a very small number of parking spaces. You are expected to be able to attend the Plymouth office at short notice when asked, but most of us have a hybrid working pattern, with a mix of home and office working. Some roles are required to be in the office for the full working week as they will be working face-to-face with clients – the advert will state this.

**13. Employment status**

As advertised

**14. Hours of Work**

We work 37 hours a week (9-5 Monday to Fridays), with an early finish at 4:30pm on Fridays. We are open to discussions about flexible working, which may include part-time work, job shares, or different working hours. Staff may be able to agree a different working pattern with their manager. Part-time working is usually at 14.5, 18.5 or 22.5 hours a week, unless otherwise advertised.

**15. Entitlement to work in the UK**

A job offer will be subject to confirmation that you are permitted to work in the UK in accordance with the provisions of the Asylum and Immigration Act 2006. You will be asked to provide evidence of your entitlement to work in the UK if you are successful and an offer of employment is made.

Please note that Citizens Advice Plymouth does not hold a sponsor licence, and, therefore, cannot issue certificates of sponsorship under the points-based system.

**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, death in service benefit and our workplace pension, working at Citizens Advice Plymouth 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. We have monthly one to ones focused on your wellbeing, performance, and career plans.
* **Employee assistance programme.** Everyone working at Citizens Advice Plymouth has immediate access to professional and completely confidential counselling, debt and money information, and legal advisory services.
* **Healthcare Plan:** Your health and wellbeing is really important to us, and to support this we offer a healthcare plan which gives you money back on prescription charges, dentist, opticians, physiotherapy, acupuncture, and other therapies, as well as money back if you have to stay in hospital. (New members of staff will be eligible on completion of probation period)
* **Support when things in your life change.** We’ll be there for you with options for flexible working, career breaks, enhanced contractual sick pay (after probation) and support for parents and carers.
* **A commitment our people.** Our ratio of managers to staff is capped at 1 manager for 10 people. We are committed to supporting mental health and wellbeing in the workplace. As part of this we have signed up to the Mindful Employer charter and our managers and HR Department are trained Mental Health First Aiders. We recognise Unison the union, and we have confidential Health and Wellbeing Champions you can talk to, as well as staff representatives, an Employee Engagement Forum, monthly whole-office meetings, Christmas parties and away days.

**Equity, Diversity and Inclusion**

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. We accept that equal treatment of people from discriminated against groups is insufficient to achieving equal opportunities and that positive action is also required. The service is therefore committed to positive action as a means of removing barriers to services and employment opportunities for those from discriminated against groups.

We encourage and welcome applications from suitably skilled candidates from all backgrounds and parts of our community. We particularly welcome applications from candidates who are disabled, or people from Black, Asian and minority ethnic backgrounds, as these people are currently underrepresented at Citizens Advice Plymouth. We also actively welcome applications from LGBTQ+ candidates.

To help us achieve this, we aim to make our recruitment process as fair as it can be:

* **We judge the application, not the person**. The selection panel won’t see your personal details. Your application will be scored solely on your answers to the person specification section. This makes sure each person’s response is judged on its merits and not on their background.
* **We send interview questions 24 hours in advance.** We recognise that somepeople face barriers with interviews and we want you to focus on demonstrating your experience rather it being than a memory test, so we level the playing field by offering you a chance to prepare for the interview.
* **We offer a guaranteed interview scheme**. If you have a disability, are from a Black, Asian and minority ethnic background, or are LGBTQ+ **and** your application meets the minimum criteria for the post, we’ll interview you for it.
* **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 [here](https://www.gov.uk/guidance/disability-confident-how-to-sign-up-to-the-employer-scheme).
* **We’re a Mindful Employer.** We’re committed to better mental health at work. As part of this we’re signed up to the Mindful Employer charter, meaning we agree to not make assumptions about a person with a mental health condition and their ability to work and ensure we are fair in the recruitment of new staff in accordance with the Equality Act 2010.
* **We will meet any reasonable adjustment requests.** Please let us know if you need us to adapt our application process so there are no barriers for you to apply.

As part of our commitment to Equality, Diversity and Inclusion, Citizens Advice Plymouth also has network groups, such as:

* REACH – for all Black, Asian and minority ethnic people within the service
* Disability
* LGBTQ+

These are safe spaces for individuals to have a voice, raise concerns, seek support from others, and act as a critical friend to the wider organisation.

**Ex-offender policy**

Citizens Advice Plymouth is committed to the promotion and delivery of equal opportunities to clients and to volunteers and paid staff. We welcome applications from any part of our community, including from people with criminal records.

Having a criminal record will not necessarily bar you from working for Citizens Advice Plymouth – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, we are not able to employ anyone with a conviction for a sexual offence against a child or vulnerable adult, regardless of when the offence took place. All other convictions will be considered on an individual basis.

Anyone who applies to work or volunteer within Citizens Advice Plymouth will be asked to disclose details of unspent convictions during the recruitment process. This information will not be shared with the interview panel and will only be discussed in more detail if you are the successful candidate. Candidates must not withhold information about unspent convictions and failure to reveal information that is directly relevant to the position could lead to a withdrawal of an offer of employment or volunteering opportunity.

We undertake not to discriminate unfairly against volunteers or paid staff who voluntarily reveal that they have a criminal conviction. Equally, we will not discriminate unfairly against volunteers or paid staff where a DBS check reveals a criminal conviction or other information about offences. We will ensure that an open and measured discussion will take place on the subject of any offences or other matter that might be relevant to