

# Recruitment Pack

## Trainer & Supervisor

Thank you for your interest in working at Citizens Advice Somerset.

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:

- Any introduction including our vision, mission and values
- The role context, profile, competencies and personal specification
- Terms and conditions
- Next steps

If you want to chat about the role further, please email [HRandResources@casomerset.org.uk](mailto:HRandResources@casomerset.org.uk)

## Introduction

We are an independent charity that provides free, confidential, and impartial advice for people in Somerset. We support whole communities by helping people individually.

**Our Vision: Free and trustworthy advice is available so that we can all live in a society where people receive the help they need to solve their problems**

**Our Mission: Delivering excellence in advice services in Somerset and beyond by:**

- **Making sure great advice is easily available**
- **Taking early action to prevent problems getting worse**
- **Reaching out to those who find it hardest to get the help they need**
- **Working with other organisations**
- **Influencing others**

We will provide high quality and seamless services that meet our clients' needs, enabling them to:

- Act early to prevent a problem becoming a long-term issue
- Get help to address critical issues and crisis
- Tackle the under-lying causes of financial distress and inequality

People come to us with all sorts of issues. They may have money or housing problems, may be facing a crisis or just considering their options. We provide free, confidential and impartial advice. This means that people can be sure our advice is independent of any undue or commercial influence.

No other national membership organisation sees as many clients from so many different backgrounds as Citizens Advice and this gives us a unique insight into the challenges people are facing. With the right evidence we can show big organisations – from companies right up

to central government – how they can make things better for people. By helping people with the underlying causes of their problems and making sure those problems don't get worse, we save the government and public services lots of money every year.

## **Our Values**

### **Accessible**

We respect and appreciate one another; this means we welcome people from all walks of life and backgrounds and that our culture is free of bullying, intimidation and negativity. We recognise personal qualities and skills and we respect our differences.

We treat one another as equals; this means that everyone in our Organisation is of equal value regardless of their role, title or area of responsibility.

We work hard to create a friendly and professional work environment; this means that we are welcoming, supportive and positive towards one another, clients, partners and other agency staff

### **Professional**

We trust each other as professionals and as people; this means that each member of the organisation will accept responsibility for their actions and decisions. We honour our commitment to confidentiality so that we may speak openly and freely among ourselves.

We take individual ownership for our own performance and we show consideration for each other's needs; this means that we follow through on our promises, listen to each other and work together to problem solve. We co-operate and we think as a team.

We are committed to working together to improve our services; this means that we welcome fresh ideas and new ways of working and that we take time to gather feedback on our performance and to learn and improve.

### **Trustworthy**

We practice open and honest communication; this means that we behave constructively and assertively to address any difficulties as they arise. We will work in an inclusive way with openness and transparency.

We are committed to spending time together and to developing our skills and knowledge; this means that we will attend meetings and training and that we will take time to keep everyone informed of our whereabouts and key activities.

Our services operate 5 days a week across Somerset. Our service is delivered via our Somerset Adviceline, Digital channels and face to face appointments in the community.

We have around 80 paid members of staff supported by an active board of trustees and just over 100 volunteers. We have strong working partnerships with local stakeholders including one of our funders, Somerset Council. Please explore our website to find out more about our work, partnerships and our impact [Citizens Advice Somerset - Free, confidential, advice to help you.](#)



**Valuing inclusion**

Our Trustees, staff and volunteers come from a range of backgrounds and we particularly welcome applications from people with lived experience of using advice services, disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black Asian Minority Ethnic (BAME) communities.

## **The Role**

The Trainer and Supervisor will work across the four Area Advice teams to deliver training and development programmes to new and existing volunteer and paid advisers. This will include delivering training from the main sites (Taunton, Yeovil, Bridgwater) and other community locations.

The postholder will report to an Area Advice Manager and will support with volunteer recruitment, induction, training and on-going development. The aim of this role is to ensure that every adviser develops the knowledge, skills and confidence to deliver high quality advice within an established quality framework.

The training supervisor will be required to provide training on advice topics, advising skills and know-how and in the use of technology and IT and administration systems.

Alongside your training role you will be expected to provide advice directly to clients and to provide advice supervision for allocated sessions.

To be successful in this role you will be an experienced adviser and trainer with excellent communication and IT skills, a problem-solving attitude and the ability to work calmly and efficiently in a busy and fast paced environment.

### **Training**

- Assist with identifying the learning and development needs of the advising team and documenting these as part of the skills audit and assessment process
- Maintain a thorough and up to date understanding of the Skillbook Adviser Learning Modules, including the requirements of the Advice Quality Standard and Financial Conduct Authority Standards in relation to the essential skills and knowledge for advisers
- Maintain a thorough and up to date working knowledge of the advice systems and technology in use across the service
- Support with the review and development of the adviser competency framework and identify and progress ways to improve processes and deliver training more efficiently and consistently
- Prepare and deliver adviser training courses on a rolling basis as directed by the Area, Advice Managers providing in person and online sessions within each course
- Provide adaptation and support for trainees to ensure that we offer an accessible and rewarding training programme
- Maintain relevant learning and HR records ensuring that up to date and accurate training logs are held on each trainee's progress and attainment
- Support the post-training adviser development programme by co-ordinating and delivering observation and shadowing sessions across the four main sites (Yeovil, Taunton, Bridgwater, Shepton Mallet).
- Co-ordinate the assessment and sign-off of trainees as they complete their training programme

- Work with colleagues to maintain the learning records and training renewal data
- Provide progress reports and other updates as required
- Create and maintain a bank of resource materials and guidance tools as needed, ensuring these are organised and easily accessible.
- Work in conjunction with the ASMs to deliver volunteer information sessions
- Monitor and respond to expressions of interest from potential volunteers, administer the volunteer recruitment process and assist with volunteer interviews

### **Session Supervision and Quality Assurance including Case Checking**

- Provide in person and remote supervision as required
- Complete quality of advice case checking alongside the wider team of supervisors and Area Advice Managers
- Assist with the Task List, helping to work through tasks and complete actions pending
- Provide real-time coaching/feedback – for example helping advisers explain and interpret information for clients
- Monitor KPIs to drive performance and identify opportunities for improvement
- Participate/attend team briefings where possible
- Respond to Safeguarding, Complaints, Subject Access Requests etc

### **Advice and Casework**

- Provide advice and advice with casework to a nominated number of clients as directed by the Area Advice Manager
- Know when to refer/signpost to internal and external projects
- Work within expected timeframes and targets

### **Research and Campaigns**

- To assist with research and campaigns by providing information about clients' circumstances through the appropriate channel and through encouraging and overseeing similar commitments from the other advisers and assessors
- Keep up to date with local and national calls for evidence

### **Learning, development and training**

- Participate fully in your continuing professional development training and keep your knowledge and skills up to date in accordance with the Citizens Advice standards of practice.
- Keep up to date with organisational policies and tools related to advice giving, support and communication

### **Other Duties**

- Always represent the organisation in a professional manner
- Carry out any other tasks as requested to ensure the effective delivery and development of the organisation.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Always demonstrate a commitment to the aims, principles and policies of the Citizens Advice Service and the implementation of our equality policies.
- Ensure the highest standard of consideration and respect to all stakeholders of the Citizens Advice Service, including clients, volunteers, colleagues and funders.

Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the job and is not included to be an inflexible list of tasks.

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| <b>Person Specification</b> - Please ensure that your application refers to all the specifications listed in the person specification and provide us with a brief explanation of how you meet all the essential criteria. | Selection Matrix                         |
| Experienced adviser (Citizens Advice or similar) with extensive experience of advice needs assessment and advice delivery in person and on Adviceline   | Essential Application form & Interview   |
| Experienced adult trainer with a track record of delivering training in person and remotely   | Essential Application form & Interview   |
| An effective performance coach with the ability to give and receive feedback constructively and to challenge appropriately in a professional environment  | Essential Application form & Interview   |
| Excellent client skills and experience of working with frustrated/angry/distraught clients in a calm and effective manner and the ability to deal effectively with escalated issues in a supervisory capacity             | Essential Application form               |
| A thorough understanding of the advice quality standard with an ability to train others to the standard, monitor and check that work meets the required standards   | Essential Application form               |
| Excellent communication and people skills and the ability to work respectfully and appropriately with a team of paid and volunteer advisers   | Essential Application form & Interview   |
| Ability to prioritise your own work and support the work of others, meet deadlines and assist colleagues (staff and volunteers) to ensure the team works effectively in a pressured environment                           | Essential Application form & Interview   |
| Willingness and ability to travel to meet the needs of the job.   | Essential Application form               |
| Excellent IT, phone, video chat and keyboard skills and an up to date working knowledge of the technology and applications in use in the advice service   | Essential Application Form and Interview |
| A dynamic and flexible approach to the role and the ability to be forward thinking, (identifying areas for improvement) with a positive attitude to feedback and change   | Essential Application Form and Interview |
| A commitment to continuing professional development, primarily aimed at keeping abreast of developments that are relevant to the role   | Essential Application form               |
| An understanding of, and commitment to, the aims, principles and policies of the Citizens Advice Service and the positive value of equality, diversity and inclusion.   | Essential Application form & Interview   |



## Terms and Conditions

- Post:** Trainer & Supervisor
- Hours:** 30 - 37.5 hours per week
- Salary:** £27,917 to £29,469 per annum pro rata for part time workers
- Base** Somerset - our teams are in Bridgwater, Shepton Mallet, Taunton and Yeovil
- Travel** Attendance at our offices across Somerset. Travel expenses will be reimbursed in accordance with our policy.
- Reports to:** Area Advice Manager (ASM)



## Next Steps

Please complete the application form found our website under Vacancies and return it to [HRandResources@casomerset.org.uk](mailto:HRandResources@casomerset.org.uk) by 10am Monday 12<sup>th</sup> May 2025

Interview dates are scheduled for 14<sup>th</sup> May 2025

If you are selected for interview this date will be confirmed