

## Trainee Advice Professional & Session Supervisor

Thanks 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:

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### Want to chat about this role?

If you want to chat about the role further, you can contact Kylie Page by emailing [kylie.page@casomerset.org.uk](mailto:kylie.page@casomerset.org.uk)



### 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.



### **3 things you should know about us**

**1. We're local and we're national.** We are part of a national network of Independent Citizens Advice organisations. The Citizens Advice network offers direct support to people in around 260 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.

**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 Citizens Advice Somerset works**

Citizens Advice Somerset provides free, confidential, and impartial advice. We are an independent, local charity and a member of the national Citizens Advice network. Please explore our website to find out more about our work, partnerships and our impact.

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 advise and support over 20,000 clients each year and have around 70 paid members of staff supported by an active board of 11 trustees and just over 100 volunteers. We have strong working partnerships with local stakeholders including our primary funder, Somerset Council.

## Terms and Conditions

Job Title:	Trainee Advice Professional and Supervisor
Hours	22.5 to 37.5 (over 3 - 5 days)
Salary	£27,236 PA pro rata (qualified) £25,467 PA pro rata (trainee)
Pension	3% employer contribution
Base	One of our main offices (Yeovil, Shepton, Taunton, Bridgwater)
Travel	Willingness and ability to travel to provide relief cover or to attend meetings
Application Process	Completed forms returned by 14 <sup>th</sup> May at 12 noon
Interviews	Yeovil Office 17 <sup>th</sup> May 2024

## What's in it for you?

Hybrid working, working onsite with some home working.

We offer a supportive environment where our people feel valued and enjoy plenty of opportunities for professional development within our service.

You will join a service committed to making a difference to the lives of our community.

Work pattern of Monday to Friday, with usual working hours being between 9am and 5pm.

20 days paid annual leave plus statutory holidays (pro-rata for part time workers) with additional 3 days of discretionary leave in each year

Auto enrolment pension scheme with an employer contribution of 3%



## Next Steps

Please complete the application form and return it to: [sam.hook@casomerset.org.uk](mailto:sam.hook@casomerset.org.uk) no later than 12 noon on the 14<sup>th</sup> May 2024

## Role Profile



You will join our Early Help and Prevention Team. The advice professional traineeship will offer you a pathway into advising and then onto advising and supervising advice over an agreed period of between 8 – 18 months (depending on candidates' transferrable skills, knowledge and progress).

Once qualified the primary responsibility of the role will be to provide advice to clients and to oversee (supervise) the safe and effective delivery of our telephone and email advice service (Adviceline) and our Community Access Points (located across Somerset).

The training pathway will provide access to a nationally recognised qualification and upon completion candidates will be qualified as a specialist adviser and supervisor. Once fully competent the postholder will provide on-going expert advice guidance and general assistance to other advisers, advice assistants and allocated clients throughout the day.

Over time the role will evolve to include oversight of advice delivery where the postholder will support the delivery teams with work queue/task management and allocation, responses to their queries and assistance with complex client issues.

The fully competent role will also include conducting quality assurance procedures, including case evaluations, to ensure and uphold the standard and accuracy of advice delivered.

The traineeship is suitable for candidates that are able to demonstrate how they meet the criteria set out in the competencies framework outlined below. This traineeship is available for those who lack direct experience of working within an advice service or who have limited advice technical expertise.



## Competencies

**Applicants for the Advice Professional Traineeship will be considered against the following essential criteria.**

### Essential

1. You are an effective learner with demonstrable experience of accomplishment in work based learning programmes. In addition you have an English and Maths qualification at GCSE grade c or above (or an equivalent) and you have achieved a qualification at further education level (A level or similar).
2. You are a “team player”, someone who really cares about people – our volunteers, staff, clients and partners - and works effectively with them all.
3. You will bring transferrable customer service and client care skills for example from working in other industries or sectors.
4. You will be able to communicate confidently, clearly, and sensitively with people at all levels of the organisation. You will bring diplomacy and tact to your role, and you will be

able to de-escalate a situation, for example an agitated client, customer, colleague or referral partner.

5. You will be passionate about advancing equality, diversity, and inclusion and pro-active in looking for ways to make our services as accessible and inclusive as possible.
6. You will have a calm manner and you will be good at multi-tasking with an ability to maintain oversight and control of a busy service and all those within it.
7. You will be competent using office and cloud-based systems and have a background of using administrative skills and systems including producing accurate records of work completed.
8. You will be confident about working within a quality assurance framework with an aptitude for making decisions on “day to day” matters that accord with and uphold policy and practice.
9. You will have an excellent eye for detail and an active interest in bringing forward opportunities to make our services and our processes better.

#### **Desirable**

1. You may bring coaching and mentoring skills.
2. You may bring other advice related technical expertise to your role. This may include:
  - Advice specialism (housing, welfare, debt etc)
  - IT expertise (MS365, social media, SharePoint etc)
  - Training and workforce development (qualified as an adult tutor)
  - Marketing and communications (developing promotional materials and service information)

**To apply:** complete our application form and provide evidence of how you meet the essential criteria above (points 1 – 9). Only those candidates that meet the essential criteria will be shortlisted for interview.

## **Job Description - Trainee Advice Professional and Supervisor**

### **Learning and Development**

1. Positive attitude to your own learning and development with the ability to complete learning modules and apply the knowledge gained effectively in a work setting
2. Complete the Citizens Advice Learning Pathway (advisers and supervisors) over a set period of time (4 – 8 months of appointment)
3. Complete specialist advice subject units (housing, benefits, debt, employment) and supervisor qualification within 18 months of appointment
4. Keep your technical knowledge up to date and participate in continuing professional development
5. Support the training and development of new and existing advisers and advice assistants

### **Advice and Casework**

1. To deliver advice assessment, advice and specialist casework to an allocated number of clients by email, phone or in person in a timely manner and in accordance with the policies and procedures of the organisation and the requirements of the Advice Quality Standard
2. Undertake thorough and appropriate research and explore options and implications so that clients can make informed decisions and maintain clients' involvement at all stages of the case
3. To ensure that accurate on-going records are regularly updated and communications between the various parties (clients, other staff/partners, external agencies) are clearly documented and undertaken professionally
4. To maintain key dates, tasks and other admin systems and ensure that all the required actions necessary to complete and close the client case and document client outcomes are undertaken to a high standard

### **Advice Supervision**

1. Ensure that the service is prepared and fully operational during delivery hours including assisting with rota planning, IT and system use (eg logging in) and task list management
2. Support advisers with rota scheduling identifying sessions where additional cover is required
3. Work with the wider team of Supervisors and Area Advice Managers to contribute to the advisers' morning briefing and update bulletins
4. Co-ordinate and manage advice sessions across a variety of channels (phone, email and face to face appointments)
5. Oversee safe and appropriate practice and ensure that health and safety matters are dealt with efficiently and effectively
6. Support the running of the advice session by providing some technical assistance in the use of our platforms, resources, telephone systems and database etc
7. Provide advice expertise (advice topics) to assist advisers ensuring all our advisers are supported and able to carry out their roles effectively
8. Assist advisers to identify their clients' options and where relevant oversee clients' additional support or access to follow-on appointments
9. Encourage good teamwork and lines of communication between all members of the Organisation and with our wider partners
10. Help to co-ordinate inward referrals and appointment bookings ensuring that we respond in a timely manner

11. Ensure that all client communications are appropriately logged and progressed

### **Advice Supervision continued**

12. Monitor and manage the quality of advice given ensuring adherence to the National Quality of Advice Audit standards
13. Review the teams' advice case notes, checking clients were advised accurately and taking steps to initiative corrective or additional advice where necessary
14. Ensure that policy and practice are adhered to and monitor case record completion to support quality of advice standard compliance
15. Contribute to the monthly quality of advice audit and provide advisers with coaching and developmental feedback
16. Ensure that incidents (data breach, safeguarding, complaints) are dealt with in accordance with our policy and procedures
17. Contribute to the maintenance and development of local information systems

### **Research and Campaigns**

1. Actively promote our research and campaigns activities including highlighting examples of clients' cases and raising evidence forms as appropriate
2. Keep up to date with research and campaigns issues ensuring that they are fully integrated within the advice service

### **Other Duties**

1. Promote volunteering and support the work of the training supervisor to ensure that volunteers are recruited, trained, inducted and assisted to settle into the advice team
2. Create a positive working environment in which equity and diversity are well-managed, dignity at work is upheld and staff and volunteers are able to do their best.
3. Ensure information about our services are kept up to date
4. Work with others to support the daily use of IT (equipment and systems) and the smooth running of the service
5. Attend internal and external meetings
6. Abide by health and safety guidelines and share responsibility for your own health and safety and that of colleagues
7. Undertake any other duties or tasks as required

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.

**Person specification (once qualified the Trainee will satisfy the following specification)**

	<b>Essential</b>
Actively committed to the aims, principles, and policies of the Citizens Advice Service	
Confident and experienced in the management of others. Training will be considered for candidates who don't have previous people management experience	
The ability to prioritise your own work and that of individual team members, ensure that deadlines are met and manage multi-tasking very effectively whilst working in a fast- paced environment.	
Qualified as a generalist adviser (completed the Adviser Learning Programme or equivalent) with experience of delivering advice to clients. Candidates with excellent transferrable skills but who have not got a formal advice qualification may apply as training can be provided to be completed over an initial two month period.	
Able to demonstrate an understanding of the issues involved in interviewing and advising clients, including over the telephone and in person. Experience of, and an ability to deal with, frustrated/angry/distraught clients in a calm and effective manner, and the ability to deal effectively with escalated issues, requests to speak to the supervisor and first stage complaints	
Experience of supervising a team delivering services to clients, preferably within an advice focused service, ensuring delivery is client-centred, high quality and compliant (policy and regulatory requirements)	
Demonstrable experience of using advice and casework quality assurance systems (or similar) to monitor standards and address under-performance	
A thorough and rigorous approach to your work with an ability to maintain high standards of detail and accuracy	
Ability to work effectively as part of a team, to embrace change as part of a continuous improvement cycle and to be able to explain and demonstrate best practice	
Demonstrable experience of decision making, trouble-shooting, and dealing with issues that arise in a consistent and calm manner	
Excellent communication skills (verbal and written) including being able to give constructive and developmental feedback to members of the team	
A positive attitude to your work and the ability to develop effective working relationships with a variety of other agencies in the Area	
Confident and capable administration with very strong IT skills including the use of MS365 and other cloud based applications (Teams video calls, SharePoint, Casebook and office software)	
Willingness and ability to travel to meet the needs of the role	
	<b>Desirable</b>
Volunteer recruitment, training, and development	