



**Hammersmith
& Fulham**

Role profile and Job Description

Assessor Telephone, Face to Face and Outreach

DURATION:	Fixed Term up 31/03/2025
GROSS SALARY:	£9,400 - £10,000 (pro-rata full time salary)
HOURS	Part-time 15 hours per week
REPORT To:	Advice Services Manager
LOCATION:	Hammersmith and Fulham

Role purpose:

- To provide assessment service via telephone, Webchats and email, so that callers receive the most appropriate source of help available for their needs.
- Undertake observations and other associated tasks, in agreement with the Team Leader, to support volunteer assessor induction
- Deliver the key tasks and set targets, to consistently deliver the Adviceline assessor role.
- Keep Casebook records of assessments
- Deliver Assessment online via telephone, email, face to face at Citizens Advice sites W14 and W12 and at our Advice Hub in Shepherd Bush Market
-

Duties and Responsibilities

Telephone, digital and face to face assessing

Provide assisted information or signposting as appropriate (using Citizens Advice public website and other appropriate websites)

- Refer clients appropriately (both internally and externally) to reflect clients' needs following agreed protocols, including making arrangements and informing clients of what to expect.
- Interview and assess client's problem(s) using sensitive listening and questioning skills
- Use tools including script to undertake through assessment
- Identify key information about the issue including time limits, key dates and any requirements for urgent advice or action (using the Advice guide website, scripts and any other diagnostic tools, as necessary).
- Identify and summarise the essence of the issue.
- Assess and agree the appropriate level of service, taking into consideration the clients ability to take the next step themselves, the complexity of the issue and the organisation's resources
- Refer clients appropriately (both internally and externally) to suit clients' needs following agreed protocols, including making arrangements and informing client of what to expect.
- Use Citizens Advice Hammersmith and Fulham resources to access internal and external partner information
- Record information given during Adviceline assessment onto the appropriate Casebook screens
- Ensure that all work meet quality standards and the requirements of the funder
- Contribute to set target for Adviceline delivered across the week
- Ensure partner organisations are notified efficiently of all appointments made by the helpline for them.
- Report regularly to the Supervisor on the day to day running of the helpline
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy
- Undertake observations and other associated tasks, to support volunteer Adviceline induction.

- Record and collect clients' data as and when required, and in accordance with GDPR
- Record stats in Casebook

Information giving

- Interview clients using sensitive listening and questioning skills in order to allow client to explain their issues and empower them to set their own priorities
- Use the Citizens Advice guide to find, interpret and communicate the relevant information
- Research and explore options and implications so that clients can make informed decision
- Refer internally or to other specialist agencies as appropriate.
- Ensure that all work confirms to the office manual and the Citizens Advice quality standards/ other funding requirements, as appropriate
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.

Research and Campaign

- Support CAHF research and campaigns work through various channels including case studies, data collection and client consent

IT

- Accept and abide by the terms of the Organisation's Acceptable Use of IT policy, and other associated policies.
- Comply with Data protection guidance including GDPR for processing and controlling data
- Use Office software and other programs as required for the performance of the role
- Use electronic diary and scheduling software to organise workload.

Administration

- Be self-servicing in the production of correspondence and other associate work
- Use IT for record keeping, following CAHF guidance

- Use IT software for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production.
- Ensure that all work conforms to CAHF quality of advice systems and procedure
- Maintain *up to date* case recording systems to permit supervision, monitoring, and case checking.

Staff group / Team Work

- Build rapport with paid and volunteer colleagues
- Attend and participate in CAHF activities including Service meetings, Staff Away Days, Annual General meeting and other staff activities.

Training and Professional development

- Identify and implement plans for own training and development needs
- Keep up to date with legislation, policies and procedure, undertake appropriate training as agreed with the line manager
- Prepare for and attend performance review /team meetings/service meetings as appropriate
- Keeping in touch with local issues, developments and changes in procedure of other agencies.
- Attend relevant internal and external meetings as agreed with the line manager.
- Commitment to continuous professional development including ongoing development of knowledge of the main enquiry areas (benefits, debt, employment, housing, consumer and family) to be able to make appropriate signposting and/or referral decisions.
- Willing to learn, accept constructive feedback, adapt to change
- Aim to improve efficiency and quality, and take responsibility for own work

Duties required of all salaried employees of CAHF.

- Undertake any other reasonable duties as required by the post
- Exercise duties in accordance with CAHF core values, and the aims and principles of the Citizens Advice Service

- Exercise Discretion in the handling of Special Category data in accordance with statutory duties of the GDPR and CAHF's applicable policies and procedures
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- Be a team player, participating and contribution to CAHF activities, and organisational development.

In addition to the tasks and duties outlined in this job description to undertake such duties as may be identified and which are generally compatible with the functions of the post.

Review

This job description will be reviewed regularly as part of individual an organisational development, performance review and may be a subject to variation.

January 2024



Person specification

Essential

1. The ability to commit to and work within, the aims, principles and policies of Citizens Advice service with commitment to equality.
2. Excellent Communication skills verbal and written with ability to record information succinctly to set quality standards.
3. Ability to interview clients using sensitive listening and questioning skills to identify key advice issues and empower clients, whilst maintaining structure and control.
4. Good understanding of the main enquiry areas (Welfare Benefits, Debt, Housing and Employment). to identify emergencies and make appropriate referrals
5. competent IT skills, especially the ability to use databases and navigate websites. Ability to accurately record information in a timely manner.
5. Flexibility and willingness to work as part of a diverse team.
6. Ability to prioritise own work to meet deadline and manage workload in a busy environment.
7. Understanding of GDPR and Safeguarding rules in regard to delivery of service to public including ability to maintain professional boundaries.
8. A commitment to continuous professional development, including a willingness to develop knowledge and skills in advice topics.

Our Values

We expect all our employees to demonstrate and promote our values.

- **Be Inclusive:**

- Maintain a client focus
- Be respectful and professional
- Contribute to a positive team spirit
- Have an open mind

- **Be Proactive:**

- Be dynamic in our approach
- Embrace innovation and change
- Speak Up
- Take responsibility

- **Stay Connected:**

- Connect with peers, with our community and with our stakeholders
- Keep up to date with changes and updates
- Give and embrace feedback
- Share information and improve collaboration

- **Focus on Impact:**

- Learn from failure
- Recognise effort and celebrate success
- Develop ourselves and empower others
- Evidence our results

Equality, diversity and inclusion

Citizens Advice Hammersmith and Fulham 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 Hammersmith and Fulham 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.



Guidance notes for applicants

Application form

Please complete your application and return it by email or post (as a Word document)

Closing Date: Monday 12th February 2024 by 3pm. **Time:** 15:00pm

Please email your completed form to recruitment@cahf.org.uk
Subject ref **Assess-1CAHF**.

The application form plays a key part in our recruitment and selection process. We use the information you provide about your skills, experience, career and education history to decide whether or not to invite you for an interview. It is important that you complete the application form as fully and accurately as possible, ensuring that you give specific examples which demonstrate how you meet the essential and desirable criteria for the role for which you are applying.

For more information about Citizens Advice Service Aims and Principles
www.citizensadvice.org.uk/about-us/

Disability

Please 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.

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 1996. 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 Hammersmith and Fulham (CAHF), does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

Diversity Monitoring

CAHF values diversity and promotes equality. We encourage and welcome applications from suitably skilled candidates from 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 CAHF. 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.

Information, experience, knowledge, skills, and abilities

This is a key section of the 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. Selection is based on an assessment of the evidence you provide against the requirements of the role as set out in the person specification. 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.

Please provide one example for each requirement. You should choose examples of past experience that clearly demonstrate what we are looking for, and be precise about what you did, how you did it and the outcome or result of your actions. Please try to limit your response to each criterion to a maximum of 200 words.

A useful guide might be S.T.A.R:

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.

Shortlisting outcomes

Shortlisted applicants will be invited for an interview. Candidates selected for interview will be required to undertake practical and interview.

Interview Dates

Interviews will take place on the dates listed in the advert. Candidates selected for interviews are expected to be available, to attend interview on the date(s) stated in the advert. CAHF strive to conduct a fair recruitment process and this means only in **exceptional** will interview dates be rescheduled. The aim being to interview all selected candidates on the stated date within the same period. Request to reschedule an interview date, will only be made for cases of **exceptional emergency**, where evidence supporting the request has been provided to the interview panel.

Feed Back – Applications and Interview

Please note: due to high volume of application forms received for recruitment vacancies, CAHF– **shortlisting panel are unable to provide Feedback on completed application forms.**

The panel will only provide Feedback to candidates who were selected for and attended interview. A request must be made by the interviewee for feedback on their performance.

References

All job offers are subject to the receipt of two satisfactory references: One should be from your current or most recent employer or line manager (if you are employed through an agency), or your course tutor if you have just left full time education. The other should be someone who knows you in a work related, voluntary or academic capacity. Both referees should be able to comment on your suitability for the role.

References will only be taken up for successful candidates following interview.

Criminal convictions

Anyone who applies to work within CAHF will be asked to disclose details of unspent convictions during the recruitment process.

Having a criminal record will not necessarily bar you from working for CAHF 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.

Criminal Records Bureau Disclosures are only requested where proportionate and relevant to the post concerned. If the post for which you are applying for requires a DBS Disclosure certificate, this will be noted in the application pack.

February 2023