



Frontline Advice Support/Admin Worker Job pack

Thanks for your interest in working at Citizens Advice Swansea Neath Port Talbot (CASNPT). This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- 4 things you should know about us
- The role profile and personal specification
- What we give our staff

Want to chat about this role?

If you want to chat about the role further, you can contact **Julie Browne** by emailing Julie.browne@citizensadvicesnpt.org.uk



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 tell it like it is and 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.



4 things you should know about us

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

2. We're local and we're national. Citizens Advice have 6 national offices and offer direct support to people in over 300 independent local Citizens Advice services across England and Wales of which Citizens Advice Swansea Neath Port Talbot is one.

3. 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.

4. 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.



The role

We are looking for someone with good communication, interpersonal and organisational skills. We need a confident, motivated individual with lots of initiative, who can work particularly well independently as well as part of a team.

Reports to: Business Continuity Manager

Responsible for: Supporting the delivery of high quality advice

Accountable for: The local Citizens Advice (LCA) meeting funder and Citizens Advice Membership Scheme requirements.

Location: You will primarily be based at our main office in Swansea but may be asked to work at any of our outreach locations across Neath Port Talbot or Swansea on a temporary or permanent basis for training or service delivery purposes.

You will be working as part of a dynamic and multi-skilled team within a busy local office and you will play a key role in making sure that:

- As the first point of contact for many clients the reception service is covered and clients are dealt with sensitively
- client paperwork is prioritised and in order by liaising with advisers and caseworkers
- letters are sent out, appointments are made and requests are followed up with clients promptly
- you will need to be an excellent communicator to ensure that you can support clients in a variety of ways to access the help and support they may need
- you will contact clients by phone, email and text to book appointments and make sure they know what they need to bring with them to appointments

You will need a good working knowledge of IT systems as the work will involve dealing with correspondence, scanning and storing client paperwork.



Key accountabilities

Reception Service

- Cover reception, receiving clients and other visitors, recording arrival times & keeping all clients informed of waiting times and appropriate service information, check-in clients with pre-booked appointments
- Assess client issues, and refer/signpost into other services, if appropriate, using the Citizens Advice Public Site, our Self-Help Tool or details about other agencies.
- Liaise with Session Supervisor to ensure most appropriate action for client is taken
- Support clients with emergency needs with applications for relevant support
- Be aware of and provide information on issues we cannot help with so that the client can determine if they want to access our service or not.
- Record/update client information on Casebook.

Client Access Points

- Answer calls from the public on CASNPT's Local Line, assess client issues, and refer/signpost into other services, if appropriate, using the Citizens Advice public site, self help guides, our Self-Help Tool or details about other agencies.
- Liaise with Session Supervisor to ensure most appropriate action for client is taken
- Support clients with emergency needs with applications for relevant support
- Be aware of and provide information on issues we cannot help with so that the client can determine if they want to access our service or not.
- Monitor referrals from partners, self referral or correspondence via email and:
- Record/ update client information on Casebook.

Advice Support Administration

- Using Casebook, record client's information, upload documents, search for and book appointments, send tasks and messages to advisers
- Monitor, follow up and complete tasks requested by advisers and caseworkers
- Chasing outcomes for clients
- Produce reports upon request, collate statistics and questionnaires as required for funding and monitoring purposes

General Administration

- Create and maintain filing systems in accordance with systems and procedures
- Open, record and distribute incoming post, and prepare outgoing mail for dispatch
- Action post as agreed with casework supervisors
- Maintain online and other electronic appointment diaries
- Maintain stocks of stationery, leaflets and posters
- Update public information materials and information

Research and Campaigns

- Assist with research and campaigns work by providing information as appropriate
- Provide statistical information on the number of clients and nature of cases and provide regular reports to management

General

- Comply with the CASNPT Policies and Procedures.
- Ensure that the CASNPT principles and values are lived and modelled at all times demonstrating commitment to the aims of the Citizens Advice service.
- Support the development, engagement and participation of volunteers throughout the CASNPT demonstrating the value the organisation places on their contribution.
- Be an active and positive member of the team.

Other duties and responsibilities

Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service. This is not an exhaustive list of tasks and the post holder may be asked to undertake any other reasonable duties in connection with their post.

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Job Descriptions are reviewed frequently and may be amended at any time in accordance with the needs of Citizens Advice Swansea Neath Port Talbot. This job description does not form part of your contract of employment



Person specification

Essential Criteria

- A. Good IT skills, across a range of formats;
- B. Ability to communicate effectively face to face and on the phone and by email, including being able to convey basic information to a client about their case;
- C. Ability to systematically manage a varied and demanding workload, prioritise tasks and meet deadlines under pressure;
- D. Ability to maintain efficient administration systems with attention to detail and to demonstrable ability to maintain accurate, up to date records;
- E. Ability to take a brief, ensure the task is understood and then work independently;
- F. General numeracy skills;
- G. An understanding of the need for confidentiality and data protection;
- H. The ability to work effectively as part of a team;
- I. The ability to give and receive feedback objectively and a willingness to challenge constructively;
- J. Understanding and commitment to work within the aims and principles of the Citizens Advice service and its equity and diversity policies



Terms and conditions

1. SALARY

As advertised.

2. ANNUAL/TOTAL LEAVE

Annual leave is 28 days pro rata per annum, including statutory holidays, and runs from 1st April to 31st March.

3. PENSION SCHEME

Citizens Advice Swansea Neath Port Talbot provides a pension scheme. Further details of this scheme will be provided to the successful applicant at offer and contract stage.

4. LEARNING AND DEVELOPMENT

Citizens Advice Swansea Neath Port Talbot has a co-ordinated staff training and development strategy. This will mean that training for your current job, and future career developments relevant to Citizens Advice Swansea Neath Port Talbot will be provided and you will be encouraged to take an active role.

5. DISCLOSURE AND BARRING SERVICE (DBS)

A criminal record will not necessarily mean you are unsuitable for the role. Should there be any disclosures; a risk assessment will be carried out in line with the Witness Service criminal record check policy. If the risks are deemed to be too high or if Citizens Advice Swansea Neath Port Talbot is unable to secure insurance for you, employment may be terminated in line with Citizens Advice Swansea Neath Port Talbot's policy.

6. EQUALITY AND DIVERSITY

Citizens Advice Swansea Neath Port Talbot 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 Swansea Neath Port Talbot will not discriminate or tolerate discriminatory behaviour on the grounds of race, colour, sex, transgender, disability, nationality, national or ethnic origin, religion or belief, marital/partnership or family status, sexual orientation, age, social class, educational background, employment status, working pattern, trade union membership or any other irrelevant factor in any aspect of employment.

Our values include a commitment to equality and fairness, and to valuing each other. All our employees are expected to have read and understood our Equality and Diversity Policy and to ensure they behave in accordance with its principles. Breaches of the policy may lead to disciplinary action.

7. DIGNITY AT WORK

Citizens Advice Swansea Neath Port Talbot is committed to providing a culture in which all staff value each other and are able to work together to their full potential in an inclusive environment free from harassment, bullying and other unacceptable forms of behaviour. Unacceptable behaviour in the workplace will be actively dealt with, all complaints will be taken seriously, confidentiality will be respected and victimisation of those that raise complaints will not be tolerated.

Our values include commitments to work together and value each other - all our employees are expected to have read and understood our Dignity at Work Policy and to ensure they behave in accordance with its principles. All staff are responsible for helping to create and maintain a positive and inclusive working environment free from bullying and harassment. All managers have a particular responsibility for ensuring a supportive and inclusive working environment in which dignity at work is actively promoted.

8. PROBATIONARY POLICY

New appointments are subject to a six months probationary period. Performance is reviewed after three months and again after six months.

9. LOCATION

As advertised.

10. FLEXIBILITY

Our roles are open to discussion about flexible working, which may include arrangements such as part-time working and job-sharing.

11. HOURS OF WORK

As advertised



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 and our workplace pension, working at Citizens Advice Swansea Neath Port Talbot 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.



Equality and diversity at Citizens Advice Swansea Neath Port Talbot

Citizens Advice Swansea Neath Port Talbot is fully committed to stand up and speak up for those who face inequality and disadvantage. We want this to be reflected in the diversity of the people who work for us.

To help us achieve this, we aim to make our recruitment process as fair as it can be. We also offer support to disabled candidates to make sure no one loses out on a role because of their condition.

We judge the application, not the person. The select panel won't see your personal details. This makes sure each person's response is judged on its merits and not on their background.