**Dundee Citizens Advice Bureau**

**Recruitment Pack**

1. Covering Letter
2. Background Information
3. Job Description
4. Person Specification
5. Personal Details Form
6. Privacy Statement
7. Equal opportunities monitoring form

Date: **2nd March 2022**

Dear Applicant

**PENSION WISE GUIDE**

Thank you for your enquiry about the above post.

You will find enclosed an application form, equal opportunities monitoring form and some background information about the bureau.

In determining which applicants will be interviewed the Interview Panel will have regard to applicants who best fit the person specification so it is important that you to use this as a guide when completing the application form we also require a personal statement

We regret that we are unable to acknowledge receipt of completed application forms unless a stamped addressed envelope is enclosed with your application.

We look forward to receiving your application by the closing date is **11th March 2022** and we would ask that you provide a telephone number where we can contact you day and/or evening. If you are selected for interview, these will be held on the **15th March 2022**

Yours sincerely

Tracy McNally

Director

**DUNDEE CITIZENS ADVICE BUREAU**

**Information to applicants**

Citizens Advice Bureaux are the major providers of holistic information, advice and assistance, operating from 205 service points that cover Scotland from the islands to the City Centres.

The Bureaux are staffed by trained volunteer advisers under the supervision of the manager, and provide responses to clients' enquiries covering the whole range of social issues. Despite being a generalist service, most enquiries are concerned with matters related to problems of poverty and deprivation.

These local offices are wholly independent and receive funding from their respective local Councils in the form of annual grants. Bureaux are autonomous bodies under the control of a local Board of Directors. These consist of representatives of local statutory and voluntary agencies, elected members of the public, and staff representatives.

All bureaux are members of Citizens Advice Scotland (the Scottish Association of CABx), and as such must meet specific conditions of membership related to standards of service and other matters. The Association receives financial support from central government through the Department of Trade and Industry.

Enquiries are across a wide range of fields, and clients expect high quality advice and assistance (including representation at tribunals and in Court when appropriate) on what are, at times, highly complex matters. The main enquiries at the present time relate to problems with welfare benefits and money; employment; goods and services; housing; and family and personal situations.

All CAB posts demand a high level of commitment and will involve a flexible approach to working. No overtime payments are made, but time off in lieu is given. Expenses are reimbursed for travel related to approved duties.

**DUNDEE CITIZENS ADVICE BUREAU**

Position: Guidance Specialist (Telephone and Face to Face)

Location: Dundee

Responsible to: Director

**Overall​ ​purpose​ ​:**

Pension Wise is the free and impartial HM Government service providing guidance to people about their defined contribution pension options. The Pension Wise Guidance Specialist provides accurate and relevant information and guidance to people over the telephone and face to face, helping them to understand the full implications of their pension choices.

***Main duties:***

1. Provide information and guidance to members of the public, in line with the Pension Wise service ‘standards’.
2. Using the skills appropriate to the role, help consumers to understand the full implications of their pension choices.
3. Raising consumer awareness of pension scams and fraud and to encourage and assist consumers to report them to the relevant authorities.
4. Responding proactively and flexibly to consumer demand, working to agreed service delivery standards.
5. Provide timely and accurate follow up information that is clear and understandable.
6. Contribute towards shared best practice across Pension Wise and the Citizens Advice network.
7. Ensure that any required management information is both captured and reported on a timely basis.
8. In addition, may be required to carry out ad hoc projects to improve the service we provide, attend meetings or workshops and support promotional activity for the service, within the scope of the role.

The above job description is not exhaustive and is clarified to include broad duties inherent in the post.

**Person​ ​Specification:**

**Knowledge, skills and experience**

***Essential***

1. Good foundation knowledge of pensions law, practice and products, gained in a pensions technical role.
2. Numerical skills to understand and translate complex financial matters.
3. An understanding and appreciation of wider retirement issues.
4. Proven ability in financial capability and an understanding of the issues consumers face in trying to manage their money.
5. Ability to translate complex ideas and topics into clear, concise and engaging content that consumers are able to understand.
6. Ability to work on own initiative with minimum supervision and under pressure
7. Ability to monitor and maintain own standards and meet qualitative and quantitative targets for service delivery.
8. Flexibility and willingness to work as part of a team.
9. An understanding of and commitment to the aims and principles of the Citizens Advice service.
10. A commitment to on-going personal and professional development.

***Desirable***

1. APMI or CII qualifications or equivalent in related areas would be of benefit.
2. Willingness to travel, possibly involving overnight stays, and working outside of core hours including evening and weekend working. Own transport may be required.

**Requirement for role:**

* + - 1. Understanding of, and commitment to, the aims and principles of the Citizens Advice Scotland network in which equality and diversity is embedded throughout.
      2. Awareness that Citizens Advice Clients are at the heart of everything we do.
      3. Willingness to travel within the UK (including occasional overnights) and to work unsocial hours occasionally to meet tight timescales.
      4. Proven ability to use IT packages

**Successful applications are made a conditional offer subject to:**

Successful completion of passing of accreditation training and exam

Satisfactory references

Disclosure Scotland Checks

**Notes for applicants on completing the Application**

* The form should be completed in black ink or black ballpoint pen or typed. This will make it easier for photocopying purposes.
* One of your referees should be your present or most recent employer. If you have not been employed or have been out of employment for a long time, please give the name of someone who knows you sufficiently well to confirm the information you have given and to comment on your ability to do the job. This should not be a relative or purely personal friend.
* The enclosed person specification lists the minimum requirements for this post. When short listing for interview the selection panel will only consider the information contained in your C.V. and personal statement and will assess this against the person specification. The selection panel cannot make assumptions about the nature of the work you have done or your experience from a list of job titles. It is therefore important that you demonstrate how you meet the requirements
* If you are shortlisted for interview, the selection panel will ask you questions based on the person specification, which will cover the areas in more detail.

**Please complete all sections of this form, including candidate details, acceptance of our privacy notice for job applications, reference details and a declaration of your right to work in the UK.**

**Application form for Pension Wise Agents**

**Completed applications must be emailed by midnight on Friday, 13th March 2020**

There are guidance notes within the application form where appropriate and at the end of the form. However if you have any questions on the completion of this application form, please email [tracy.mcnally@dundeecab.casonline.org.uk](mailto:tracy.mcnally@dundeecab.casonline.org.uk)

Please answer all questions as fully as possible**.** The information you provide in your application form will be used as part of the process of identifying candidates to invite to interview. Therefore please include all relevant skills and experience you have which match the role profile and person specification.

## Personal

|  |  |  |
| --- | --- | --- |
| **Title** |  | |
| **Surname** |  | |
| **Forenames** |  | |
| **Address** |  | |
| **Home Phone No** |  | |
| **Mobile Phone No** |  | |
| **E-mail address** |  | |
| **Current notice period** |  | |
|  |  | |
| **What type of employment are you applying for?** | | Full time/ Part time |
| **Where did you see this post advertised?** | |  |

## Application process requirements

|  |  |
| --- | --- |
| **We have made a positive commitment to employing disabled people.**  **Please indicate any adjustments you require to the shortlisting process or any information you wish us to take into account when considering your application** |  |

Sections 3-5 are where you should input all relevant experience that you have. It is recommended that you have a copy of the role profile and person specification to hand when completing these sections and consider what experience you have that matches our requirements for the role.

## Previous Experience

Please list previous experience with most recent employment first. You can copy and paste the table to provide details of each role you have held. For each role you should include the following:

|  |  |
| --- | --- |
| **Name & Address of Employer** |  |
| **Position Held** |  |
| **Dates Employed** |  |
| **Reason for Leaving** |  |
| **Brief Description of Main Duties, Responsibilities & Achievements** |  |

|  |
| --- |
| **If you are not currently in paid employment, please describe what you are doing at present e.g. voluntary work, studying, working in the home, etc** |

## 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 and person specification. No assumptions will be made about your achievements and abilities.

You should choose examples of past experience that clearly demonstrates what we are looking for. You should be precise about what you did, how you did it and the outcome or result of your actions.

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 you can also give relevant examples from other aspects of your life e.g. voluntary or unpaid work, school or college work, family or home responsibilities.

|  |
| --- |
| **This role requires you to have strong listening and questioning skills and to be able to apply the knowledge you have to a particular client’s circumstances. Please give examples of your experience in this area. (Max 250 words)** |

|  |
| --- |
| **This role requires you to have a proven ability to work on your own initiative and proven organisational skills. Please outline your experience in this area. (Max 250 words)** |

|  |
| --- |
| **This role requires you to have a good understanding of consumer challenges in relation to financial matters. Knowledge of pension law and practice is also highly desirable but not essential. Please outline your experience in this area. (Max 250 words)** |

|  |
| --- |
| **This role requires you to have the numerical skills to understand financial matters and good IT skills. Please outline your experience in this area. (Max 250 words)** |

## Education and Training

Please detail your highest level qualifications and any others which are particularly relevant to the post. You may be asked to provide proof of qualifications during the application process.

|  |  |  |
| --- | --- | --- |
| **Subject** | **Level/Qualification** | **Date Gained** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

You can add additional rows, if required, by placing the cursor in the last box and pressing the tab button.

Any other relevant qualifications

|  |  |  |
| --- | --- | --- |
| **Qualification** | **Or Equivalent** | **Date** |
|  |  |  |
|  |  |  |

You can add additional rows, if required, by placing the cursor in the last box and pressing the tab button.

## References

Any offer of employment is conditional upon receipt of satisfactory references. Please provide details of at least two references covering your last 3 years of employment. One of these should be your present or most recent employer, the other could be someone who knows you in a work related or voluntary capacity. If you have been in education, please provide details of where an academic reference can be obtained. Both referees should be able to comment on your suitability for the post applied for.

For each reference, please detail the following information:

|  |  |
| --- | --- |
| **Name, Job Title & Organisation** |  |
| **Postal Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed / studied** |  |

|  |  |
| --- | --- |
| **Name, Job Title & Organisation** |  |
| **Postal Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed / studied** |  |

Please note that any referees will not be contacted until an offer of employment has been made and your authorisation has been obtained.

I certify that the information given on this form is correct to the best of my knowledge.

Signed (type name):

Date:

**Further guidance notes**

**Shortlisting outcomes**

Shortlisted applicants will be invited for an interview. Some positions may require additional assessments. If this is the case, further details will be provided if you are shortlisted.

**Terms and conditions**

We are not able to advise all terms and conditions as each Bureau is an independent charity and terms will vary. You will be able to understand more details as you go through the recruitment process.

**Training**

If you are successful in your application, there will be mandatory training for you to attend including both e-learning and a week-long face-to-face session held at locations across Scotland. There will also be assessments which must be completed successfully in order for you to be confirmed in the post.

**Application form alternative formats**

If you need this information and application in an alternative format, for example, large print, audiotap, Braille or Easy Read, please contact us.

**Disability**

If you are selected for interview, the interviewing bureau will ask you to let them 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.

**General Data Protection Regulation**

Dundee Citizens Advice Bureau is aware of its obligations under the General Data Protection Regulation (GDPR) and is committed to processing your data securely and transparently. Our ‘Privacy Notice for Job Applicants’ sets out, in line with GDPR, the types of data that we collect and hold on you as a job applicant, how we use that information, how long we keep it for and other relevant information about your data. It is important that you read this notice so that you are aware of how and why we are using your data, please check the box below to confirm that you have done so.

**☐ I confirm that I have read, understood and agree to the Dundee Citizens Advice Bureau Privacy Notice for Job Applicants.**

**Right to Work in the United Kingdom**

All employees must be able to demonstrate that they are legally entitled to work in the United Kingdom.

In order to apply for employment with Citizens Advice Scotland, you must declare that you have the right to work in the United Kingdom and that, if successful, you will be able to provide the necessary documentation (typically a passport or a birth certificate, together with your National Insurance Number).

By completing this application form, you are declaring that you are legally entitled to work in the United Kingdom.

**Please state below, by selecting the statement that applies to you, if there are any restrictions or limitations on your legal right to work in the United Kingdom.**

|  |  |
| --- | --- |
| **☐** | I confirm that I have the right to work in the United Kingdom without restriction. |
| **☐** | I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_\_\_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I have no restrictions or limitations on my Visa. |
| **☐** | I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_\_\_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I am restricted to (please detail any restrictions or limitations on working in the UK):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## EQUAL OPPORTUNITIES – RECRUITMENT MONITORING FORM

The CAB is striving to ensure equality of opportunity in its volunteering and employment policies and therefore we have decided to monitor our recruitment practices. This will help us identify areas of under representation in our workforce and to assess those areas where positive action is needed. In order that we can monitor each stage of the recruitment process, you will be asked to complete this form on application.

Your co-operation in completing this form would be greatly appreciated. We must stress that any information you give will be strictly confidential. You are not obliged to answer the questions but you will appreciate that, for our monitoring policy to be wholly effective, we would hope to have 100% response.

If you do not wish to answer any question(s), this will not affect your application in any way. There follows an explanation of some of the sections where appropriate. Thank you for your time and co-operation in completing our form.

We wish to give you the following assurances

* The information provided will not form the basis of any part of selection
* All information will be regarded as confidential
* This information will only be used for statistical purposes to monitor the composition of the service.

**1. ETHNIC ORIGIN**

We appreciate that some people, including those of mixed race, may not be happy with classification used on monitoring forms. The classifications we have used are those used by the General Register for Scotland – census forms. If you wish to classify yourself in some other way, please use the additional space provided to do so.

I would describe my ethnic origin as *(in your own words or if you prefer tick one of the following):*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| White Scottish |  | Indian |  | Chinese |  |
| Other White British |  | Pakistani |  | Caribbean |  |
| Irish |  | Bangladeshi |  | African |  |
| Any other white background |  | Any other Asian background |  | Any other Black background |  |

Other ethnic background (please specify)……………………………….

**2. GENDER**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| I am *(please tick):* | Male |  | Female |  | Transgender |  |

**3. AGE**

|  |  |  |  |
| --- | --- | --- | --- |
| 25 and under |  | 55 and over |  |
| 26 - 34 |  | Declined to answer |  |
| 35 - 54 |  |  |  |

**4. DISABILITY**

We understand that many employees do not declare disability or caring responsibilities because of possible discrimination against them by employers in the selection process and many people do not register as disabled for the same reason. We would like to know how many people we attract to the service so that we can monitor the effectiveness of our policies towards disabled people and their carers.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Disability\* | Yes |  | No |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Registered disabled\* | Yes |  | No |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Would you require special adaptations/equipment | Yes |  | No |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Carer of someone with a disability | Yes |  | No |  |

Please specify\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*If you answer in the affirmative to any of the above questions and are short-listed for interview, please contact the CAB to ensure that interview arrangements are to your satisfaction.

**5. SEXUAL ORIENTATION**

We appreciate that some people may find the question on sexual orientation to be an extremely personal one and we must therefore re-iterate that you are under no obligation to answer it.

I would describe myself as *(please tick):*

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Heterosexual |  | Lesbian |  | Gay |  | Bisexual |  | |  | | --- | |  |   Transgender |

**6. MEDIA RESPONSE**

Where did you see this post advertised or how did you find out about it?

|  |
| --- |
|  |

**7. COMMENTS**

Do you have any comments about our monitoring form?

|  |
| --- |
|  |

