

Candidate information pack

# Advice Quality and Operations Manager

We must  
keep on protecting  
each other.



HANDS



FACE



SPACE

**citizens  
advice**

Stevenage

cyngor ar bopeth  
citizens advice  
cyngor ar bopeth

citizens  
advice

## Thanks for your interest in working at Citizens Advice Stevenage.

This job pack should give you everything you need to know to apply for this role and what it means to work for us

In this pack you'll find:

- Information about organisation
- Purpose of the job
- Job description and person specification
- Interview and Application Process
- Candidate guidance notes

### Want to chat about this role?

If you want to chat about the role further, you can contact Charlie by emailing [recruitment@castevenage.org.uk](mailto:recruitment@castevenage.org.uk)





## **We help people find a way forward**

We can all face problems that seem complicated or intimidating. At Citizens Advice we believe no one should have to face these problems without good quality, independent advice.

That's why we're here: to give people the knowledge and the confidence they need to find their way forward - whoever they are, and whatever their problem.

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

1. We're local and we're national. Citizens Advice is a Network made up of 4 national offices and 265 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. Whatever the problem, we won't turn people away.
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.

# Advice Quality and Operations Manager

**Reporting to:** Head of Advice

**Department:** Advice Services

**Hours:** Full time – 37.5 hours per week

**Salary:** £30,000-£35,000 dependant on experience

**Holidays:**  
27 plus bank holidays

**Location:** Office in Stevenage.  
Hybrid working by arrangement

## Purpose of the Job

Advice Quality and Operations Managers will make sure clients get accurate and appropriate advice and that advisers are supported and can develop their skills.

Maintain a consistent quality of advice and help for clients by providing support, guidance and feedback on a day-to-day basis and using those insights to drive advice service development.

This role is vital in fostering a culture of quality and excellence within the agency, ensuring that both staff and volunteers are well-equipped to deliver exceptional advice services to clients.

# Job Description

## Strategy and planning

- Work with the Head of Advice to develop and deliver an operational plan to support delivery of the strategic priorities, which is measured, monitored and reported up to the CEO and Board of Trustees.
- Co-ordinate activities, procedures and systems so as to promote the common policies and practices with the appropriate advice services.
- Ensure that the strategy is accessible to and understood by all staff and volunteers and they know the role they play in achieving our goals.

## Risk management and compliance

- Regularly review the risks to which the charity is exposed to relating to Advice Services and provide assurance that systems or procedures are in effective operation to manage those risks.
- Ensure the use of systems in place to meet the requirements of all applicable regulatory bodies relating to the Advice Service Delivery.
- Working with the rest of the management team ensures that good data protection practices are embedded in our day-to-day operations.
- Assess requests made in relation to GDPR.

## People management and development

- Support team members in continuous learning that will equip and develop people to deliver outstanding advice delivery. Responsibility for the delivery of the training and development plan for the Advice Services Department including, sourcing, delivering, evaluating and maintaining records.
- Supervise the work of paid staff and volunteers
- Maintain and develop standards of service delivery.
- Advise the Head of Advice on staffing and service-related issues.
- Plan and allocate work, monitor achievements of deadlines and key performance indicators and provide support as appropriate.
- Ensure that the service area and projects are adequately resourced.
- Ensure recruitment and selection of paid staff and volunteers as appropriate.

- Develop inclusive learning and development activities to meet quality standards and the organisation's learning and development plan. Facilitate inclusive group and / or one-to-one learning and development activities. Organise internal and external learning and development activities to ensure the competence and continuing development of staff and volunteers.
- Contribute to the assessment of competence of staff and volunteers. Co-ordinate assessment activities and make final decisions on competence.
- Working with the rest of the leadership team ensures the organisation delivers a fair, inclusive, equitable and transparent employee and volunteer experience, taking account of our EDI aims and in line with employment law and the Equality Act 2010.
- Ensure Open and timely communication that provides information about the organisation and context for decisions that are made, helps to build trust and confidence and earn legitimacy.
- Ensure the effective performance management and development of staff through regular supervision sessions, appraisals and learning and development.
- Ensure Training is delivered and records confirm all client facing paid staff and volunteers that may be involved in providing money and debt information and advice have completed an accredited training programme
- Direct reports: Dependent on advice area, between 5 to 11 Advisors per AQOM, plus volunteers.

## **Operational performance management**

- Maintain, develop and monitor effective and relevant performance indicators and management processes, with particular emphasis on the application of customer insight data and feedback on complaints.
- In line with the Advice Quality Standard, work with the Head of Advice and the other Advice Quality and Operations Managers to ensure that staff and volunteers have adequate supervision and that advisers have access to support at all times when delivering advice to clients.
- Ensuring quality - actively supporting the quality of advice by guiding the team to information sources, checking that all aspects of a client's situation have been considered, checking that follow up work is progressed, and that research and campaigns issues are identified.
- Monitor the quality of advice given to clients to ensure that standards meet Citizens Advice requirements. Completing Case Checking, QAA Audits and independent file reviews (IFR) to ensure quality assurance at a whole service level. Using the insights to further develop the services to clients and skills of advisers.
- Maintain and develop standards of service delivery.
- Take part in internal consistency exercises at least quarterly.

- Providing support - actively supporting each team member to develop their skills and competences, by explaining, guiding, demonstrating, encouraging, suggesting, coaching, giving constructive feedback and challenging appropriately - adapting the level of support to individual competence and need, and taking account of the team as a whole.
- Manage the practicalities of the service: Including overseeing all practical issues relating to the service delivery, ensuring service delivery and adequate cover is in place, allocating the team to face-to-face work and other communication methods, checking waiting times and interview lengths, and if necessary, dealing with client or Citizens Advice emergencies.
- Provide technical support and act as consultant to the advisers.
- Monitoring of service delivery and advice service contracts performance to report against KPIs, with reference to outcomes for clients, identifying any issues and proposed actions. Reporting significant risks to the Head of Advice. Ensure that appropriate systems are developed and maintained for case recording, statistics, follow up work and quality control.
- Client Experience: Use our written process for dealing with complaints, ensuring that regulatory requirements are met (for debt and money advice complaints) to ensure Complaints are handled effectively and data is used to drive improvements where appropriate.
- Ensuring that appropriate data protection procedures are in place and are followed by all workers.
- Lead on safeguarding and gender violence issues in accordance with policies.

### **Other duties and responsibilities**

- Understanding and acceptance of the need to work occasional evenings and weekends, both on site and on-call, as required.

### **Stakeholder Engagement**

- Collaborate with management and other departments to align quality standards with organisational goals.
- Engage with external partners and regulators to ensure compliance with industry standards and share best practices.

### **Reporting and Analysis**

- Prepare and present reports on advice quality metrics to management and stakeholders.
- Utilise data to identify trends, risks, and opportunities for improvement.

### **Confidentiality and safeguarding**

- Confidentiality is a core principle of Citizens Advice. Support the team with the application of the confidentiality policy.

- Implementing adult and child safeguarding policies and training staff and volunteers how to identify and deal with safeguarding concerns.
- Dealing with a conflict of interest and ensuring our service takes the right action to protect the client, our staff and volunteers and the service.

## **Research and Campaigns**

- Ensure that staff and volunteers consistently and accurately generate Advice Issue Codes (AICs), evidence forms and profile data and participate in the Network Panel Surveys.

# Person Specification | What you need to do this job

## Essential Criteria

- Ability to lead and contribute to a team, including the ability to prioritise own work and the work of others, and take decisions in the day to day running of a busy service area.
- Ability to plan and manage projects.
- Commitment to continuing professional development.
- Experience of monitoring and maintaining service delivery against agreed targets.
- Ability to plan and prioritise own time and work and work of others in a pressured environment.
- Experience of analysing information to produce reports.
- Leadership and management ability within the context of understanding the needs of a voluntary sector organisation.
- Ability to communicate effectively in person, in writing and over the telephone with individuals and with a wide variety of organisations and audiences.
- Ability to meet Citizens Advice competence with a minimum of three years' experience of involvement with advice giving.
- Ability to research, analyse and interpret complex information and to produce and present clear verbal and written reports.

## Desired Criteria

- Significant experience managing large advice and helpline services which includes supporting individuals within at least one of the areas of – (for example) welfare benefits, debt management, housing, or health and social care issues.
- Demonstrable experience of driving innovation and service improvement within an advisory/customer focused service.
- Experience of supporting change.
- Well-developed staff management and leadership skills, with strong experience of implementing robust performance management processes.
- Proven ability to communicate effectively verbally and in writing, including excellent IT skills.
- Proven ability to create a positive working environment in which equality and diversity are well managed, dignity at work is upheld and staff are empowered and motivated to do their best.
- Experience in managing budgets.

- Ability to ensure best use of IT systems and packages in the provision of advice services and the ability to monitor and maintain casework systems and procedures.
- Ability to work with a variety of organisations and to earn and maintain the trust of those people with whom the Bureau deals.
- Ability to contribute to the team combined with willingness to learn and develop and have a positive attitude to change with an ability to plan ahead.
- Access to own transport and able to work at any service location in the Bureau's area of operation as required.

## **Application Process:**

To apply, please send your CV and concise supporting statement which includes examples and evidence of when you have demonstrated the attributes listed within the person specification. You will be expected to address each point separately and, in the order listed.

Applications should be submitted to [recruitment@castevenage.org.uk](mailto:recruitment@castevenage.org.uk)

If you do not complete a full supporting statement in the requested format, your application may be rejected.

We are an equal opportunity employer. If you have any requirements (e.g. for attending an interview) please note these clearly on in your letter.

## Interview Process:

We are currently accepting applications for this role, and the position will remain **open until we have appointed the right candidates. We reserve the right to close the vacancy at any time** once a suitable appointment has been made. We therefore encourage early applications to avoid disappointment.

Shortlisted candidates will be contacted by telephone, so please give a daytime telephone number or somewhere we can leave a message to arrange an interview.

## Our selection process consists of three stages:

- **Stage 1 – Telephone Interview**

Initial interviews will take place via telephone. The date and time will be arranged individually upon receipt of your application.

- **Stage 2 – In-Person Interview**

If successful at Stage 1, you will be invited to attend a formal, in-person interview at our office in Stevenage. The date for this will be agreed with you directly.

- **Stage 3 – Practical Activity & Final Q&A**

Candidates who progress beyond Stage 2 may be invited to take part in a short practical activity and a final Q&A session. This will take place on the **same day** as the Stage 2 interview. You will be informed **at the end of your Stage 2 interview** if you are proceeding to Stage 3.

# Guidance notes for applicants

## Equal Opportunities

We are an equal opportunity employer. Please let us know if you require any adjustments to be made to the application process or if you have any requirements (e.g. for attending an interview). Note these clearly on in your letter. 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 Stevenage does not hold a sponsor license and, therefore, cannot issue certificates of sponsorship under the points-based system.

## 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. 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 Citizens Advice Stevenage 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 Citizens Advice Stevenage – 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.

Disclosure and Barring Service (DBS) 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, this will be noted in the application pack.

## Health and Safety

It will be the duty of every employee while at work to take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts or omissions at work.

The duties and responsibilities listed above describe the post as it is at present. The post holder is expected to accept any reasonable alterations that may from time to time be necessary.

## Addressing each point of the person specification

This is a key section of the application 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.





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**Candidate Briefing Pack**

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Company number 03836105

