**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: **5TH February 2019**

Dear Applicant

**PENSION WISE TELEPHONY**

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 **7th March 2019** 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 **13th March 2019**

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 Based)

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, 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.

**Notes for applicants on completing the Personal Details form**

* The form should be completed in black ink or black ballpoint pen or typed. This will make it easier for photocopying purposes.
* Please refer to the job description and provide a written statement that addresses how you meet the requirements of the role. You should include examples which demonstrate how you meet the requirements. Please also provide a copy of your C.V.
* 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.**

**Candidate Details**

Please complete your details below:

|  |  |
| --- | --- |
| **Candidate Name** |  |
| **Previous Name(s) if applicable (please include dates)** |  |
| **Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Role Applied For** |  |
| **Where did you see the job advertised?** |  |
| **Current (or most recent) job title** |  |
| **Current (or most recent) employer** |  |
| **Current (or most recent) salary** |  |
| **Notice Period** |  |

**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.**

**References**

Any offers of employment with Dundee CAB are conditional upon receipt of satisfactory references.

Please provide below details of where we can obtain at least two references **covering your last 5 years of employment** (include additional boxes if necessary).

If you have been in full-time education during the last 5 years, please provide details of where an academic reference can be obtained.

For each reference, please detail the following information:

# Referee 1

|  |  |
| --- | --- |
| **Name of referee** |  |
| **Job title of referee** |  |
| **Organisation**  |  |
| **Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed** |  |

# Referee 2

|  |  |
| --- | --- |
| **Name of referee** |  |
| **Job title of referee** |  |
| **Organisation**  |  |
| **Address** |  |
| **Email Address** |  |
| **Contact Telephone Number** |  |
| **Dates employed** |  |

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

**Criminal Convictions Declaration**

Each Citizens Advice Bureaux is an equal opportunities employer. In order to meet statutory requirements, some posts may require background checks to be completed.

**You do not need to declare offences which would be deemed as spent under the Rehabilitation of Offenders Act 1974.**

1. Have you ever been convicted for a criminal offence?

 Yes [ ]  No [ ]

Please give details of date(s) of offence(s), nature of offence(s) and sentence(s) passed.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Are you at present the subject of criminal charges?

Yes [ ]  No [ ]

 Please give details:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Right to Work in the United Kingdom**

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

In order to apply for employment, 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 proof of 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 [insert date] 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 [insert date] and I hold the appropriate Visa documentation to confirm this right. I am restricted to [detail any restrictions or limitations on working in the UK]

**Privacy notice for job applicants**

Dundee CAB is aware of its obligations under the General Data Protection Regulation (GDPR) and is committed to processing your data securely and transparently. This privacy notice sets out, in line with the GDPR, the types of data that we will collect and hold on you as a job applicant. It also sets out how we will 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.

This notice does not form part of any contract of employment or other contract to provide services. We may update this notice at any time.

**Data controller details**

Dundee CAB is a data controller, meaning that it determines the processes to be used when using your personal data. Our contact details are as follows:

Dundee Citizens Advice Bureau, Central Library, Level 4, Wellgate Centre, Dundee DD1 1DB. E-mail: bureau@dundeecab.casonline.org.uk. Telephone no, 01382 307494.

**Data protection principles**

In relation to your personal data, we will:

* process it fairly, lawfully and in a clear, transparent way
* collect it only for reasons that we find proper for the purposes of making recruitment and selection decisions and for ensuring that our equal opportunities obligations are met
* only use it in the way that we have told you about
* ensure it is correct and up to date
* keep it only for as long as we need it
* process it in a way that ensures it will not be used for anything that you are not aware of or have not consented to (as appropriate)
* process it in a way that ensures it will not be lost or accidentally destroyed

**Types of data we process**

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data).

We will hold the following types of data about you, during the recruitment and selection process:

* your personal details including your name, title, address, personal email address, personal phone numbers
* whether or not you have a disability, in order that we can make suitable adjustments to our recruitment and selection processes
* information included on your application form, including references, education history and employment history
* information used for equal opportunities monitoring purposes, which will be held separately from any other documentation provided by you and which will not be attributable to you
* documentation relating to your right to work in the UK

**How we collect your data**

We collect data about you in a variety of ways, this will include the information you would normally provide in an application form or a job application cover letter, or notes made by our recruitment panel during a recruitment interview. Further information will be collected directly from you when you complete forms at the start of your employment, for example, your bank and emergency contact details. Other details may be collected directly from you in the form of official documentation such as your passport or other right to work evidence.

In some cases, we will collect data about you from third parties, such as from former employers when gathering references.

Personal data is kept in personnel files or within the Anytown CAB’s HR and IT systems.

**Why we process your data**

The law on data protection allows us to process your data for certain reasons only:

* in order to perform the employment contract that we are party to
* in order to carry out legally required duties
* in order for us to carry out our legitimate interests
* to protect your interests and
* where something is done in the public interest.

All of the processing carried out by us falls into one of the permitted reasons. Generally, we will rely on the first three reasons set out above to process your data.

We need to collect your personal data to ensure we are complying with legal requirements such as:

* carrying out checks in relation to your right to work in the UK
* making reasonable adjustments for disabled employees.

We also collect data so that we can carry out activities which are in the legitimate interests of Dundee CAB. We have set these out below:

* making decisions about who to offer employment to
* making decisions about salary and other benefits
* assessing training needs
* dealing with legal claims made against us

If you are unsuccessful in obtaining employment, we may seek your consent to retain your data in case the outcome of the recruitment process changes or other suitable job vacancies arise at Dundee CAB for which we think you may wish to apply. You are free to withhold your consent to this and there will be no consequences for doing so.

**Special categories of data**

There are "special categories" of more sensitive personal data which require a higher level of protection. Special categories of data are data relating to:

* information about your health, including any medical conditions
* information about your sex life or sexual orientation
* information about your race, ethnicity, religious beliefs or political opinions
* information about trade union membership
* genetic and biometric data.

We must process special categories of data in accordance with more stringent guidelines. Most commonly, we will process special categories of data when the following applies:

* you have given explicit consent to the processing
* we must process the data in order to carry out our legal obligations
* we must process data for reasons of substantial public interest
* you have already made the data public.

We will use your special category data:

* for the purposes of equal opportunities monitoring
* in order to make appropriate adjustments to the recruitment and selection process if you have a disability

We do not need your consent if we use special categories of personal data in order to carry out our legal obligations or exercise specific rights under employment law. However, we may ask for your consent to allow us to process certain particularly sensitive data. If this occurs, you will be made fully aware of the reasons for the processing. As with all cases of seeking consent from you, you will have full control over your decision to give or withhold consent and there will be no consequences where consent is withheld. Consent, once given, may be withdrawn at any time. There will be no consequences where consent is withdrawn.

**Criminal conviction data**

We will only collect criminal conviction data where it is appropriate given the nature of your role and where the law permits us to do so. This data will usually be collected at the recruitment stage, however, may also be collected during your employment should you be successful in obtaining employment. We use criminal conviction data to determine your suitability for the post and to provide a safeguard for our clients and volunteers.

**If you do not provide your data to us**

One of the reasons for processing your data is to allow us to carry out an effective recruitment process. Whilst you are under no obligation to provide us with your data, if you do not provide it we may not able to process your application.

**Sharing your data**

Your data will be shared with colleagues within Dundee CAB where it is necessary for them to undertake their duties with regard to recruitment and selection. This includes, for example, trustees from our board of directors, the bureau manager, any other individuals who are involved in screening your application and interviewing you.

Your data will be shared with third parties if you are successful in your job application. In these circumstances, we will share your data in order to obtain references as part of the recruitment process. We may also share your data with Disclosure Scotland, if criminal record checks are required for the post in question.

We do not share your data with bodies outside of the European Economic Area.

**Protecting your data**

We are aware of the requirement to ensure your data is protected against accidental loss or disclosure, destruction and abuse. We have implemented processes to guard against such.

Where we share your data with third parties, we provide written instructions to them to ensure that your data is held securely and in line with GDPR requirements. Third parties must implement appropriate technical and organisational measures to ensure the security of your data.

**Data Retention / How long we keep your data for**

In line with data protection principles, we only keep your data for as long as we need it for and this will depend on whether or not you are successful in obtaining employment with us.

If your application is not successful, we will keep your data for three months after the recruitment exercise ends. If you have consented to our retaining your data in case future vacancies arise, we will keep it for a maximum of six months.

At the end of this period, we will delete or destroy your data, unless you have already withdrawn your consent to our processing of your data in which case it will be deleted or destroyed upon your withdrawal of consent.

If your application is successful, your data will be kept and transferred to the systems we administer for employees. We have a separate privacy notice for employees, ich will be provided to you.

**Automated decision making**

No decision about you, which may have a significant impact on you, will be made solely on the basis of automated decision making - i.e. where a decision is taken about you using an electronic system without human involvement.

**Your rights in relation to your data**

The law on data protection gives you certain rights in relation to the data we hold on you. These are:

* The right to be informed. This means that we must tell you how we use your data, and this is the purpose of this privacy notice
* The right of access. You have the right to access the data that we hold on you. To do so, you should make a subject access request
* The right for any inaccuracies to be corrected. If any data that we hold about you is incomplete or inaccurate, you are able to require us to correct it
* The right to have information deleted. If you would like us to stop processing your data, you have the right to ask us to delete it from our systems where you believe there is no reason for us to continue processing it
* The right to restrict the processing of the data. For example, if you believe the data we hold is incorrect, we will stop processing the data (whilst still holding it) until we have ensured that the data is correct
* The right to portability. You may transfer the data that we hold on you for your own purposes
* The right to object to the inclusion of any information. You have the right to object to the way we use your data where we are using it for our legitimate interests
* The right to regulate any automated decision-making and profiling of personal data. You have a right not to be subject to automated decision making in way that adversely affects your legal rights.

Where you have provided consent to our use of your data, you also have the unrestricted right to withdraw that consent at any time. Withdrawing your consent means that we will stop processing the data that you had previously given us consent to use. There will be no consequences for withdrawing your consent. However, in some cases, we may continue to use the data where so permitted by having a legitimate reason for doing so.

If you wish to exercise any of the rights explained above, please contact

Tracy McNally, Director, Dundee Citizens Advice Bureau, Central Library, Level 4, Wellgate Centre, Dundee DD1 1DB.

**Making a complaint**

The supervisory authority in the UK for data protection matters is the Information Commissioner (ICO). If you think your data protection rights have been breached in any way by us, you are able to make a complaint to the ICO.

## 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?

|  |
| --- |
|  |