**WEST DUNBARTONSHIRE**



**CITIZENS ADVICE BUREAU**

**RECRUITMENT PACK**

1. **Background Information**
2. **Employment Benefits**
3. **Notes for Applicants**
4. **Privacy Statement**
5. **Equal Opportunities Monitoring Form**

### BACKGROUND INFORMATION FOR APPLICANTS

Citizens Advice Bureaux are this country’s major providers of confidential, free and independent, advice, information and assistance, operating from 230 service points that cover Scotland from the islands to the highlands and to all the City Centres.

Bureaux are staffed by trained volunteer advisers with the support and supervision of Managers 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.

West Dunbartonshire Citizens Advice Bureau (WDCAB) is a wholly independent local charity which receives its core funding from West Dunbartonshire Council. WDCAB is an autonomous body under the control of a local Board of Trustees. The Trustees are elected members of the public as well as representatives from West Dunbartonshire Council and Citizens Advice Scotland.

WDCAB is based in Dumbarton. In total, we have currently have approximately 18 paid staff and 20 volunteers. All our volunteers and staff members undergo an intensive training and coaching programme. In 2024 we helped almost 5,000 people with over 30,000 issues.

We deal with enquiries which cover a wide range of social welfare issues, 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; energy costs; employment; goods and services; housing; and family and personal situations.

Applicants should be under no illusion about the extent of hard work and pressure involved in working for the CAB. These posts demand a high level of commitment.

**HOW TO APPLY**

.

• Please apply by sending your CV and a supporting statement detailing how you meet the criteria listed as our ideal candidate to [joe@wdcab.co.uk](mailto:joe@wdcab.co.uk)

• 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.

• When shortlisting for interview the selection panel will consider the information contained in your supporting statement and will assess this against our Ideal Candidate criteria.

• 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 use the space provided to demonstrate how you meet the requirements of the post. Paid and voluntary work are not the only experiences worth quoting. Other life experiences and skills may be just as valid.

### Employment benefits

Our people are our greatest strength and make West Dunbartonshire Citizens Advice Bureau a great place to work. We place our people at the forefront of everything we do, and we offer a range of benefits to show how much we value everyone who works for us.

Work life balance is as important to us as it is to you and our working practices and policies support this as much as possible, and include a generous annual leave allowance, and flexible working opportunities for everyone.

Our benefits are designed to enhance your health, wellbeing and finances as well as support your family and let you grow professionally and personally in your role.

**Current Benefits**

We value our staff and over the last four years we have taken significant steps to improve staff salaries, culminating in a restructure which resulted in a significant salary increase for most staff.

**Work-life balance**

* Flexible working opportunities for all staff
* Hybrid working
* Generous leave entitlement

**Health and Wellbeing**

* **Occupational Sick Pay**: up to six months full pay and six months half pay, dependant on service
* **Employee Counselling service**: access for all staff and volunteers
* **Supportive Employee Welfare Policies**
* **Employee health plan:** includes dental checks & trauma, optical, podiatry, screening, disability cover, death cover, etc., with limits based on scheme chosen. Partners and children under 18 included.
* **Perkbox:** through health plan membership, employees have access to an all-in-one employee benefits and rewards platform that provides perks, discounts and benefits and gives access to curated wellbeing content.

**Financial Benefits**

* **Pension Scheme**: 5% employer contribution.

**Other benefits**

* Generous maternity, Adoption and Paternity pay
* Family Friendly Policies and Support
* Learning and Development Opportunities for all

**About the role**

We have an exciting new opportunity for a dynamic and enthusiastic individual to join our team. The role will involve dealing with clients, partners and third parties by telephone, face to face (including home visits and outreach) and via digital channels. Whilst the successful candidate will provide advice and support on the full range of social welfare issues, it is anticipated that many enquiries will be a result of the Cost of Living crisis and rising energy costs. The Caseworker will therefore have experience and understanding of the welfare benefits system, budgeting and money issues and will be prepared to undergo further training to support our holistic advice service.

The successful candidate will be an enthusiastic, motivated team member with excellent interpersonal skills, the appropriate technical skills and a commitment to the work of the CAB service. Good organisational skills are essential, as is a knowledge of computer systems and their applications.

**OUR IDEAL CANDIDATE**

## Our ideal candidate will have a strong commitment to social justice and equality. They should demonstrate excellent communication skills, the ability to work as part of a team, and demonstrate a deep commitment to the values and mission of the Citizens Advice Bureau.

## In addition, our ideal candidate will be able to evidence the following:

## Experience

## recent advice experience in the area of welfare benefits, debt and utilities

## Skills, abilities and personal style

## ability to work with customers in a sensitive and professional manner

## effective written and oral communication skills including the ability to negotiate

## an ability to prioritise own work and meet deadlines

## Knowledge and understanding

## understanding of and commitment to the aims and principles of the citizens advice service and its equality and diversity policies

## understanding of the needs of the communities we serve

## awareness of the wider issues which can affect our customers

Our ideal candidate would also have a current full driving license and use of own car.

**JOB DESCRIPTION - CASEWORKER**

Job Title: Caseworker

Responsible to: Senior Operations Manager

Hours of Work: 35 hours per week

Salary Scale: £25,685 - £28,390 dependent on experience

Type of Contract: Fixed Term to 31st March 2027 with possible extension

**Summary of main responsibilities:**

The Caseworker will be responsible for the provision of a quality advice and information service to the public. The caseworker will play a key role in the delivery of the multi-channel (telephone, face-to-face, webchat, email, video-conference) advice service, principally covering benefits, debt, housing and employment issues, which aims to improve access to advice services for local people, particularly vulnerable families and older people. This will involve the postholder working closely with colleagues and volunteer advisors.

This Job Description sets out the practical purpose and main elements of the post. What follows is a guide to the nature and main duties of the job, but is not intended as a wholly comprehensive or permanent schedule.

**Key responsibilities include:**

* Undertaking casework of a complex nature by interviewing, advising and assisting clients in accordance with the requirements of the West Dunbartonshire Citizens Advice Bureau (WDCAB) and its funders.
* To ensure the provision and development of quality advice, information for clients by way of casework and specialist support services to WDCAB volunteers and paid staff.
* Negotiate on behalf of clients and liaise with local authorities, other statutory and voluntary organisations, including the Local Authority, Department for Work and Pensions (DWP) and other third parties.
* Communicating complex information and proposals effectively to clients and others in a structured, coherent and persuasive manner.
* Maintain clients’ involvement in decision-making at all stages of their cases, including confirming advice given, agreeing action to be taken, discussing progress and time limits as appropriate in accordance with WDCAB procedures.
* Provide support for volunteers, whether in-office, at outreach or working from home, particularly in relation to complex and/or unusual client enquiries, by being available for consultation
* Support the Adviser Training Programme and trainee adviser development through the provision of training sessions and coaching responsibilities where required.
* Ensure that research work, telephone calls and/or correspondence relating to casework is undertaken timeously.
* Assist in developing awareness of the service and undertake preventative work.
* Provide and/or contribute to briefings to internal and external staff as required.
* Assist with WDCAB’s social policy work by providing information about clients’ circumstances through the appropriate channels.

**Professional development:**

* Keep up to date with legislation, policies and procedures and undertake appropriate training.
* Keep abreast of developments in relation to information technology.
* Attend relevant internal and external meetings and training as agreed with the line manager.
* Attend training courses and seminars as appropriate.
* This is to be undertaken in line with the WDCAB Policies and Practice.

**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.
* Demonstrate commitment to the aims and principles of the WDCAB service.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

**PRIVACY NOTICE FOR JOB APPLICANTS**

West Dunbartonshire 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

West Dunbartonshire 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: Joe McCormack, West Dunbartonshire Citizens Advice Bureau, 179 High Street, Dumbarton, G82 1NW

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 and IT System within the West Dunbartonshire Citizens Advice Bureau.

**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 West Dunbartonshire 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 West Dunbartonshire 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 West Dunbartonshire 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. Data is held in locked filing cabinet in the CEO’s office.

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, which 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 Joe McCormack, CEO.

**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.

**EQUALITY AND DIVERSITY MONITORING FORM**

Completing this form will help West Dunbartonshire Citizens Advice Bureau monitor equality and diversity statistics. This information is not part of your application and will not be used in any part of the selection process. The information will be stored anonymously and confidentially.

Please do not put your name anywhere on this form. Return it separate from your other application documents by emailing it to: [**joe@wdcab.co.uk**](mailto:joe@wdcab.co.uk)

##### Position applying for:

###### Gender

Which one of the following best describes your gender?

Male

Female

Prefer not to say

Prefer to self-describe:

###### Gender Identity

Is your gender identity the same as the sex you were assigned at birth?

Yes

No

Prefer not to say

###### Sexual Orientation

Which of the following best describes your sexual orientation?

Bisexual

Gay man

Gay Woman / Lesbian

Heterosexual / Straight

Prefer not to say

Prefer to self-describe:

###### Disability

Do you consider yourself to be disabled?

Yes

No

Prefer not to say

###### Age

16-24 25-34 35-44

45-54 55-65 65+

Prefer not to say

###### Ethnicity

Please tick the box for the group to which you perceive you belong:

Arab

Asian/Asian British: Indian

Asian/Asian British: Pakistani

Asian/Asian British: Bangladeshi

Asian/Asian British: Chinese

Other Asian:

Black/Black British: African

Black/Black British: Caribbean

Other Black/Black British:

Mixed: White and Black Caribbean

Mixed: White and Black African

Mixed: White and Asian

Other Mixed:

**21**

White: British White: Irish

White: Gypsy or Irish Traveller

Other White:

Any other ethnic group:

Prefer not to say

###### Religion and Belief

Buddhist

Christian

Hindu

Jewish

Muslim

Non-religious

Sikh

Prefer not to say

Other religion or belief:

###### Caring Responsibilities

Do you have any caring responsibilities? (please tick all that apply)

None

Primary carer of a child or children (under 18 years)

Primary carer of a disabled child or children

Primary carer or assistant for a disabled adult (18 years and over)

Primary carer or assistant for an older person or people (65 years and over)

Secondary carer (another person carries out main caring role)

Prefer not to say