

## Gateway Assessor

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**Responsible to:** Advice Assessment Supervisor

**Salary:** £27,741 rising to £29,237 when fully qualified

**Hours:** Full time 5 days a week

**Contract:** Permanent

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### PURPOSE OF THE JOB

Gateway Assessors are part of a busy team at Citizens Advice Westminster, assessing phone, face to face and digital enquiries from residents across the City Council and providing. The assessors are offered full training and support, in order to:

- Ensure client's needs are accurately and quickly assessed within Citizens Advice guidelines and standards
- Provide information to assist clients and refer assessed clients to relevant services, both internal and external, as appropriate
- Arrange follow up appointments with generalist and specialist advisers as needed.

### JOB DESCRIPTION

#### **1. Gateway Assessing**

- 1.1 Assess client's problem(s) using sensitive listening and questioning skills
- 1.2 Identify key information about the problem including time limits, key dates, and any requirement for urgent advice or action
- 1.3 Identify and summarise the essence of the problem.
- 1.4 Establish what the client wants.
- 1.5 Assess and agree the appropriate next step, taking into consideration the client's ability to take action themselves, the complexity of the problem and the organisation's resources
- 1.6 Refer clients appropriately (both internally and externally) to meet client's needs
- 1.7 Record the interview accurately and in a timely manner
- 1.8 Ensure that all work conforms to the organisation's systems and procedures
- 1.9 Supporting volunteer gateway assessors and other new members of the team during sessions

#### **2. Policy and Campaigns**

- 2.1 Assist with social policy and campaigns work by providing information about clients' circumstances in relation to social policy issues

2.2 Ensure that all work conforms to the organisation's systems and procedures.

**3. Administration**

- 3.1 Maintain clear and detailed case records using Casebook, or other suitable computer-based package, for the purpose of continuity of casework, information retrieval, statistical monitoring, and report preparation
- 3.2 Use IT for statistical recording of information relating to social policy and funding requirements, record keeping and document production.
- 3.3 Provide statistical information as requested for reporting purposes as necessary
- 3.4 Ensure that all work conforms to the organisation's systems and procedures.

**4. Confidentiality and Data Handling**

- 4.1 Ensure information assurance training is undertaken on an annual basis and that all sensitive data is adequately protected and handled in accordance with the organisation's confidentiality systems and procedures, and in line with data protection regulations.

**5. Information Communication Technology**

- 5.1 Proficiency in the use of Microsoft Office suite of packages, particularly Word, Outlook, PowerPoint, and Excel

**6. Working with Others**

- 6.1 Develop and maintain good working relationships with the team, sharing information and making a positive contribution
- 6.2 Develop and maintain good working relationships with other statutory and voluntary service providers and other external stakeholders, relevant to the project beneficiary group.

**7. Public Relations and Liaison**

- 7.1 Promote the work of Citizens Advice Westminster both locally and nationally; as required
- 7.2 Represent the organisation and attend relevant internal and external meetings as required by the line manager.

**8. Professional Development**

- 8.1 Keep informed of new and changing legislation relevant to the post, and of local issues and policies
- 8.2 Read the regular Citizens Advice circulars and information items on the Citizens Advice website
- 8.3 Attend regular training to develop knowledge, skills and expertise
- 8.4 Use computers in areas relevant to the post. The postholder must be willing to undergo training in the use and application of information technology as needed to carry out relevant tasks to this post
- 8.5 Be able to identify own training needs through feedback and self-assessment, and discuss same with line manager, taking responsibility for own development
- 8.6 Attend and contribute to support and supervision and appraisal meetings with the line manager, to further own development.

**9. Policies of the Citizens Advice service**

- 9.1 Understand, and be committed to, the aims, principles and policies of the Citizens Advice service and Citizens Advice Westminster
- 9.2 Have due regard for the aims, principles and policies of the Citizens Advice service; positively promote the same, protecting the integrity and reputation of the service in the planning and execution of your duties.

**10. Other Responsibilities**

- 10.1 Willingness to work in a way that contributes to a positive working environment for all staff and volunteers
  - 10.2 Willingness to take a flexible and adaptable approach to service delivery, including working outside of normal office hours e.g., till 7pm 'up to' once a week, with prior notification.
  - 10.3 Willingness to work at any premises of Citizens Advice Westminster or outreach venue as required; ensuring effective service delivery is provided to clients
  - 10.4 Willingness to abide by the Health and Safety guidelines of the organisation, having due regard for your own health and safety, and the health and safety of others
  - 10.5 Willingness to carry out any other related tasks, as required by your line manager, which are compatible with the functions of the post.
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## **PERSON SPECIFICATION**

<b>Requirement</b>	<b>Essential or Desirable</b>	<b>Tested (Assessment Interview, Probation)</b>
<b>Qualifications / Education / Training:</b>		
1. Completion of the Citizens Advice's Gateway Assessor Learning Programme – training will be provided if you have not previously completed this.	<b>D</b>	<b>A, I</b>
<b>Experience:</b>		
2. Minimum 12 months experience of working in a fast-paced environment in a customer facing setting either in a paid or voluntary capacity	<b>E</b>	<b>A, I, P</b>
3. Experience of working at community outreach settings.	<b>D</b>	<b>A, I, P</b>
<b>Knowledge and Understanding:</b>		
4. Demonstrable understanding of the types of issues that people currently face, for example in relation to benefits, housing debt, energy etc.	<b>E</b>	<b>A, I, P</b>
5. Good knowledge of different types of statutory and voluntary agencies which can support people with benefits, housing, debt, employment, and other enquiry types.	<b>D</b>	<b>A, I, T, P</b>
6. Understand the need to empower certain clients whilst providing support to vulnerable clients.	<b>E</b>	<b>A, I, P</b>
<b>Skills and Abilities:</b>		
7. Ability to work in a fast-paced environment conducting client interviews and doing write ups within time frames and without compromising standards.	<b>E</b>	<b>I, P</b>
8. Excellent analytical skills with the ability to quickly grasp information from clients and documents, identify key points and propose next steps.	<b>E</b>	<b>I, P</b>
9. Excellent verbal and written communication skills with the ability to communicate in a clear and concise way.	<b>E</b>	<b>A, I, T, P</b>
10. Excellent IT skills with the ability to use Microsoft Office applications, databases, and communication platform such as Teams/Zoom and Outlook.	<b>E</b>	<b>A, T, P</b>
11. Numeracy skills with the ability to check benefit letters, do budget sheets etc.	<b>E</b>	<b>A, T, P</b>
12. Resilient and able to deal with potentially difficult clients in stressful situations, whilst maintaining a professional approach	<b>E</b>	<b>A, I, P</b>

<b>13.</b> An ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively	<b>E</b>	<b>A, I, P</b>
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