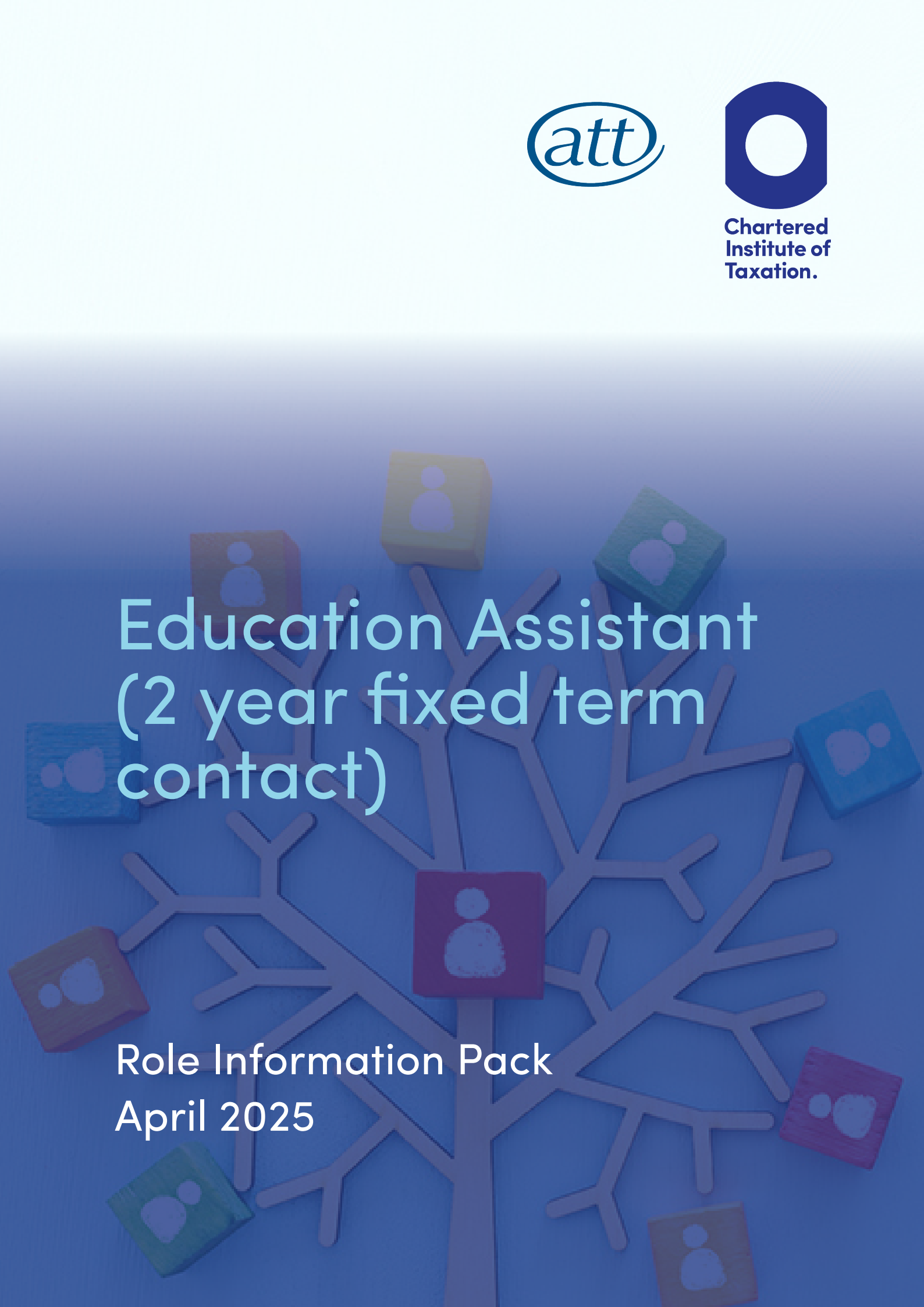




Chartered  
Institute of  
Taxation.

The background of the page features a large, stylized tree with a grey trunk and branches. Scattered around the tree are several small, 3D-style square blocks in various colors (yellow, green, blue, red, purple). Each block has a white silhouette of a person on it. The entire scene is set against a blue gradient background.

# Education Assistant (2 year fixed term contact)

Role Information Pack  
April 2025

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# Welcome

Thank you for showing interest in the Education Assistant role. The CIOT and ATT are educational charities and the leading professional bodies in the UK for tax advisers and tax technicians dealing with all aspects of taxation. If successful, you will be joining a dedicated team of staff and volunteers who ensure that we continue to meet our primary purpose of promoting education in taxation. Our key aim is to achieve a more efficient and less complex tax system for all, and you will see from our annual reports that we do this through a wide range of activities.

At the CIOT and ATT our vision is: to remain the leading bodies for taxation professionals in the United Kingdom, serving the public interest through the pursuit of excellence and with integrity, and we're looking for people who are excited about joining us on our journey. To help us achieve our vision we're looking for exceptional people who live our values and behaviours and who can inspire others; embrace change; deliver results and keep it simple.

We live by our values which are:

**Ethical** - We act with integrity, promoting high ethical standards and accepting accountability for our actions.

**Collaborative** - We value working constructively with stakeholders to achieve our goals.

**Inclusive** - We welcome, respect, and value everyone and actively consider how to be accessible.

**Empowering** - We encourage and enable personal growth and seize opportunities.

**Progressive** - We are future focused; constantly learning and driving improvements that deliver enhanced service excellence.

**Committed** - We are focused on and dedicated to the consistent delivery of our charitable objectives and services.

We know that an inclusive environment makes us more accessible and ensures we attract, engage, promote, and retain exceptional people. We welcome applications from all individuals regardless of age, gender/gender identity, sexual orientation, ethnicity/nationality, disability, or military service and welcome those who have taken career breaks. We will consider flexible working arrangements or home working arrangements for any of our roles and offer workplace accommodations to ensure you have what you need to effectively deliver in your role.

We're an organisation which was founded by ordinary people who were dedicated to making tax as simple as possible for the public and providing qualifications that are open to all. Our members and volunteers come together to help each other get the most from their Professional Bodies and enhance their future careers. If you come to work here at the ATT and CIOT, you'll be part of that. Part of something a bit different. And something really quite special.

What's more, we have a strong ethic of care for each other and our members. We recognise that our employees feel most appreciated when their thoughts and values are respected and considered. We're committed to creating a culture that recognises and truly values our individual differences and identities. So, if you'd like to be a part of an inclusive workplace where you can be yourself, where your talents are nurtured, and you feel empowered to contribute, then please apply.

Jane Ashton

ATT CEO

Helen Whiteman

Chief Executive, CIOT





# About the CIOT and ATT

The CIOT is the leading body in the UK for taxation professionals dealing with all aspects of taxation. Our primary purpose is to promote education in taxation. One of our key aims is to achieve a more efficient and less complex tax system for all. Our comments and recommendations on tax issues are made solely in order to achieve this aim; we are an entirely apolitical organisation. Membership of the CIOT is by examination, nationally recognised as the gold standard of UK taxation education. We support our 20,000 members and 5,000 students throughout their tax careers, providing assistance through our London-based head office and network of 35 branches. The CIOT is a registered charity, number 1037771, a chartered corporation and a regulatory body for the purposes of Anti-Money Laundering supervision of tax practitioners.

The CIOT is a member of the Confédération Fiscale Européenne (CFE) and is registered under the European Commission's Transparency register, number 91596579174-61. The CIOT is managed by its chief executive and directors, under the strategic guidance of the Council. The CIOT is a Chartered corporation established under Royal Charter. Its governing documents comprise the Charter, Byelaws, Member Regulations and Council Regulations. The CIOT does not raise funds through asking for public donations in any form.

The primary charitable objective of the ATT is to promote education and the study of tax administration and practice. One of our key aims is to provide an appropriate qualification for individuals who undertake tax compliance work. Drawing on our members' practical experience and knowledge, we contribute to consultations on the development of the UK tax system and seek to ensure that, for the general public, it is workable and as fair as possible. Our members are qualified by examination and practical experience. They commit to the highest standards of professional conduct and ensure that their tax knowledge is constantly kept up to date. Members may be found in private practice, commerce and industry, government and academia.



# Role description

## **Job Purpose**

Provision of external facing support for students and internal support services for the other staff in the Education Team to facilitate the movement of students from first contact through their exams to membership.

## **Operating Environment**

Within the Education Team working alongside other members of the Education Team.

## **Framework & Boundaries**

To assist the Education Team by being competent (emails and telephone calls) on anything related to CTA, ATT and Tax Pathway qualifications, as well as helping with all processes before, during and after each ATT and CTA exam session. To provide a high level of customer service to current and prospective students.

# Key accountabilities

## **Emails and Phone calls**

- Promptly answering all incoming calls and emails into the multiple Education inboxes in a timely and polite manner and responding accordingly
- Providing cover for the main Education inbox

## **General Education Team Administration**

- Processing and sending student registration welcome emails for CTA, ATT and Tax Pathway
- Contacting a sample of ATT referees as part of the registration process
- Processing company updates for CTA , ATT and Tax Pathway
- Processing exemption requests for CTA, ATT and Tax Pathway
- Processing refunds
- Assisting with ATT exam deferrals and CTA exam cancellations
- Assisting with the process to deal with any disclosed Professional Conduct issues
- Assisting with the Exam Focus and Skills Webinars
- Assisting with credit and registration extensions
- Inputting/amending database entries accurately, help maintain CRM correctly
- Ad-hoc data entry
- Provide cover for other team members as needed

## **Examinations**

- To assist with examination preparation as required
- Checking exam results/grids, ID post exams, assisting with the post exam reconciliation process etc., this will include using Excel
- Assisting with as and when required the processing of transcripts and re-checks/mark breakdowns, post-exams
- You will from time to time be required to undertake other duties of a similar level as reasonably required by your line manager. Work for other teams as may be assigned

# Potential Job Impact

- Email response times meets the desired customer satisfaction
- Provide a competent, knowledgeable and friendly telephone service
- Student registration/exam entry responses meet customer service targets
- Contribute to the very high standard of administration required for the ATT and CTA exams

## Skills needed to fulfil the role

- Communication and interpersonal skills
- Time management, organisational and multitasking capabilities
- Call handling and email response (good inbox management required)
- Competent in MS Office Packages e.g. Word, Excel
- Competent in other office IT programs e.g. CRM, Office, Adobe Acrobat etc.
- Proactive approach to improving systems and solving problems
- Excellent attention to detail
- Proactive approach to notify senior members of the team of public out-of-date/inaccurate information on the ATT/CLOT websites (education area)

### **Functional/technical skills**

MS Word, MS Excel, MS CRM, Adobe Acrobat, Kentico web management, overall external facing IT knowledge (i.e. basic knowledge of operating systems, webcams, laptop function) including Exam4 knowledge.

### **Interpersonal and work management Skills**

Ability to anticipate and meet deadlines

Ability to work accurately at speed and under pressure

# Salary & Benefits package

## Salary

The salary for this role is £29,828.63 (FTE) per annum, 21 hours per week working Tuesday, Wednesday and Thursday (remote, with occasional visits to the office). The contract type is 2 years fixed term.

## Pension

Upon joining, you will be automatically enrolled into the Aviva Group Pension Plan (9.5% employer and 3% employee contribution).

## Insurance

- Income protection cover which provides up to 75% of salary if you are absent due to ill health for more than 13 weeks.
- 24-hour group personal accident scheme providing a sum equal to three times current salary in the event of your permanent disability/ loss of a limb/ death.
- Non-contributory life assurance cover of 4 times your salary.

## Holiday entitlement

The organisation offers a generous holiday entitlement from 25 – 30 days depending on your length of service, and pro-rated based on your working pattern.

## Optional Benefits

### Bupa (private medical insurance)

You can join our company-paid private medical insurance scheme which pays for the cost of private medical treatment for acute conditions.

### Healthshield Essentials (including Employee Assistance Programme)

You can join our health & benefit programme. We pay the cost for the basic level (including any dependent children). The benefits include the refund of a range of medical costs (dental, optical, physiotherapy etc) and an employee helpline covering medical and legal issues and counselling.

### Interest Free Loans

After 6 months service you may apply for an interest free loan to help with the purchase of a season ticket or a bicycle.

### Continuous Professional Development

The Chartered Institute of Taxation requires all professional employees to maintain their CPD activities and offers an exciting range of learning opportunities through its branch and conference programmes.





# Guidance notes for applicants

Thank you for considering working with us. These notes are designed to help you through our application process. However, if you have any questions regarding the process that are not covered here, please do not hesitate to contact Sharon [sjepson@ciot.org.uk](mailto:sjepson@ciot.org.uk) for advice.

The deadline for applications is 6 May by 5pm.

You can apply by submitting a covering letter and up to date CV via email to Sharon Jepson as per the email address provided above. Your covering letter should make it clear how your skills and experience match those described in the advert or job description.

If you wish to find out more about the role before applying you may do so by emailing Sharon Jepson or by calling HR on 02073400563. This will not prejudice your application in any way.

If you do not hear from us within 2 weeks of applying this means that you have not been shortlisted on this occasion. Failure to be shortlisted for one role does not bar you from applying for others when they are advertised. This post will be resourced through a one stage interview process. There will be a prioritisation task and a proofreading task to complete if you are invited to interview.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation

email. If you do not do so we will assume you are no longer interested. If there is to be a presentation or test you will be informed of this in advance.

If you have a disability and require special arrangements to be made, please notify us as soon as you are shortlisted so we can try to accommodate your needs.

You will be told during the interview when you may expect to hear the outcome.

Although we appreciate the time and effort that goes into applying for a post with us, we do not give individual feedback on applications or interview performance.

Successful candidates will be required to provide their original qualifications, proof of the right to work in the UK and the details of two referees before they commence employment.

We look forward to receiving your application.

