



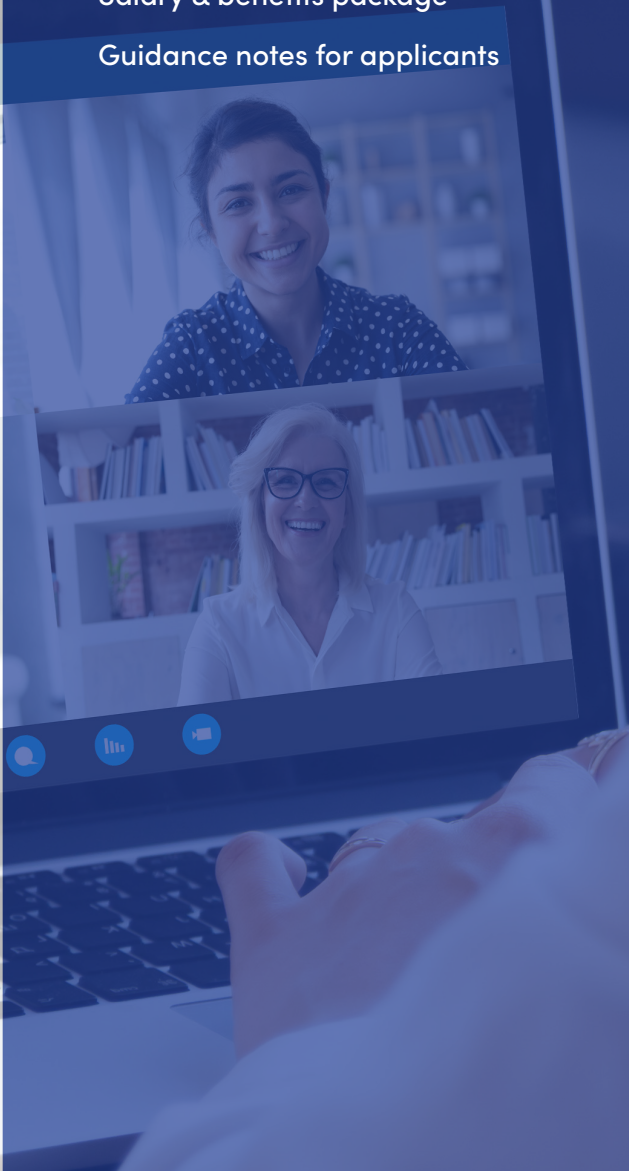
Chartered  
Institute of  
Taxation.

# Education Assistant

Role Information Pack  
February 2024

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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 promote the highest professional standards
- Collaborative** - we work together to achieve the best results
- Inclusive** - we support and respect all people, embracing diversity
- Empowering** - we encourage leadership, initiative, and innovation
- Progressive** - we continuously drive improvement, leading to real change
- Committed** - we deliver high quality, good value 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 organisations which were 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 & 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

Chief Executive, ATT

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 19,900 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 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 company 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

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 Days
- 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

## **Person Specification**

- 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/CIOT 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
- Good memory



# Salary & Benefits

## package

### Salary

The salary for this role is circa £25,500 (FTE) per annum, 21 hours per week working Monday, Wednesday, & Friday (remote, with occasional visits to the office). The contract type is permanent.

### Pension

Upon joining, you will be automatically enrolled into the Aviva Group Pension Plan (9% employer and 3% employee contribution).

### Wellbeing

- A generous holiday entitlement from 22 - 27 days, depending on your length of service, and pro-rated based on your working pattern
- Flexible working arrangements
- Help at hand app providing GP consultations, Physiotherapy, mental health support and life, money and wellbeing support
- An Employee Assistance Programme that provides staff with access to professional counselling, an online GP service, legal advice and more.
- Wellbeing hub, including webinars, resources

### Insurance

- 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.

### 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.





# 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 Brian Ross (HR Administrator) at [bross@ciot.org.uk](mailto:bross@ciot.org.uk) for advice.

The application deadline is 15 April 2024 at 5pm.

You can apply by submitting a covering letter and up-to-date CV via email to Brian. Your covering letter should make it clear how your skills and experience match those described in this pack.

If you wish to learn more about the role before applying, you may contact Jude Maidment (Education and Examinations Manager) at [jmaidment@ciot.org.uk](mailto:jmaidment@ciot.org.uk). 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.

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 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 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.

