



Chartered  
Institute of  
Taxation.

# Technical Officer

Scottish Technical and Digitalisation and  
Agent Services

Role Information Pack  
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# Welcome

Thank you for showing interest in the Technical Officer role. The CIOT is an educational charity and the leading professional body in the UK for tax advisers 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 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.

**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 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 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.

Helen Whiteman

Chief Executive, CIOT





# The Organisation (CIOT/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 19,000 members and 5,000 students throughout their tax careers, providing assistance through our London-based head office and worldwide network of 40 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.

Policy on fund raising from the public:

The CIOT does not raise funds through asking for public donations in any form.

For the Annual Report and Financial Statements of the Institute visit: <https://www.tax.org.uk/annual-reports>.



# Role description

## Job Purpose

The individual is expected to help the CIOT realise its charitable aims of promoting education in taxation and working for a better, more efficient tax system for all affected by it, such as through preparation of high-quality written submissions and active engagement at meetings with policymakers and other interest groups.

The new position will strengthen and complement the CIOT's existing team of Technical Officers by bringing recent, real-life experience of working in Scotland (ideally, but not critically, on the devolved taxes), and be familiar with using tax and accounting software and interacting digitally with HMRC and Revenue Scotland.

## Operating Environment

The CIOT is an educational charity promoting education and study of the administration and practice of taxation. One of our key aims is to work for a better, more efficient tax system for all affected by it – taxpayers, their advisers and the authorities.

## Framework & Boundaries

Our comments and recommendations on tax issues must be made solely in order to achieve our charitable aims, and should remain non-party political. Our Rules of engagement exist to ensure we operate within these boundaries.

We act as a 'critical friend' to revenue authorities and policymakers, providing unbiased commentary on tax proposals. We should endeavour to put ourselves in the other party's shoes (e.g. to understand the rationale for proposals, and the fiscal and resource limitations within which the parties operate), and make suggestions for improvements or alternatives alongside any critique provided.



# Key accountabilities

- Research, preparation and obtaining approval of high-quality technical submissions (for example, consultation responses, proactive submissions, financial bill and other parliamentary briefings), in conjunction with the relevant committees and working groups, and the wider membership where appropriate.
- Actively engage with revenue authorities, other policy makers, representative bodies and other organisations involved with tax policy and administration, establishing professional working relationships and making an informed contribution during meetings.
- Promote the technical work of the CIOT by preparing insightful content for its website, Tax Adviser magazine, press releases and other media as necessary.
- Facilitate the efficient operation of allocated committees and working groups, working closely with Chairs and Vice-Chairs to determine issues to be addressed and timescales, enabling us to provide insights on a broad range of tax matters.
- Respond to queries raised by members and the wider public in accordance with the CIOT policy on providing replies.
- Work collaboratively with other parts of the organisation (such as Professional Standards, External Relations and LITRG), and with the ATT, including other duties commensurate with the level of work and Technical Officer role.

# Skills needed to fulfil the role

## **Knowledge and experience**

- Demonstrable tax technical experience as appropriate for the allocated committees and working groups.
- Ability to communicate complex tax matters, both verbally and in writing, in a manner understandable by the target audience.
- A working understanding of the tax policy making process.

## **Functional/technical skills**

- CTA qualified, or otherwise equivalently qualified by experience.
- Excellent communication skills, to ensure that written and verbal communication is clear, concise and effectively presented.
- Ability to analyse and condense large amounts of feedback from multiple sources.
- Ability to use Microsoft Office applications, in particular Outlook, Word and Teams.

## **Interpersonal and work management Skills**

- Ability to work effectively on own initiative from home location.
- Ability to organise and prioritise workload.
- Ability to build and maintain relationships with individuals of differing levels of experience and differing priorities.



# Salary & Benefits

## package

### Salary

The salary for this role is up to £74,954.00 per annum, 35 hours per week. However, part-time applicants will be considered to work a minimum of 21 hours per week. The role is home-working with occasional attendance at the CIOT's offices and other external sites for meetings and events.

### Pension

Upon joining, you will be automatically enrolled into the Aviva Group Pension Plan (9% 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 22 - 27 days depending on your length of service.

### 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 Stuart Ringland of Lusona at [stuart@lusona.co.uk](mailto:stuart@lusona.co.uk) for advice. Lusona Consultancy has been retained as the sole supplier for this recruitment campaign.

The application deadline is 12 April 2024 at Noon.

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

Selected Candidates will be invited to complete/prepare:

1. A 30-minute preliminary interview.
2. A written exercise based on a recent consultation.
3. A presentation which outlines their knowledge, strengths and weaknesses around Making Tax Digital.
4. Face-to-face competency-based/organisational fit interview.

If you wish to learn more about the role before applying, you may contact Stuart. This will not prejudice your application in any way.

If you do not hear from Stuart 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.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation email. Interviews are expected to take place on 23 April, and by Teams. 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.

