



CIOT Technical Officer

Role Information Pack
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Welcome

Thank you for showing an interest in the CIOT 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 body 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



About the CIOT

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.

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



Role description

Job Purpose

The individual will 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. This role has a particular emphasis on private client taxation. This is to be achieved through working with practitioners at committee level and establishing and then engaging with HMRC and policymakers in the most effective manner, including building relationships with policymakers and peers, preparation of high-quality written submissions, project work and active participation at meetings.

The individual will set the direction for, and coordinate support and insights from technical committees, where relevant.

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.

The successful applicant will join a team of seven other Technical Officers and a Team Administrator. You will report to the Technical Team Senior Manager. The Technical Team sits within the CIOT's Public Policy Directorate, which also encompasses our Professional Standards and External Relations Teams, and our Low Incomes Tax Reform Group.

You will follow organisational processes and procedures, contributing ideas and being receptive to changes/developments in ways of working, so that our charitable objectives and CIOT strategies are pursued in the most efficient and effective manner.

You must be able to exercise judgement and be objective in all aspects of the role.

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 <https://www.tax.org.uk/improving-tax-policy/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

- Actively consider which piece of work to prioritise (discussing with your manager where there may be competing directorate priorities) and progress the most effective medium of engagement on issues within your responsibility.
- Research, preparation and obtaining approval of high-quality technical submissions (for example, consultation responses, proactive submissions, finance bill and other parliamentary briefings), in conjunction with the relevant committees and working groups, and the wider membership where appropriate.
- Take ownership and deliver cross-cutting work as agreed with your manager which furthers the CIOT's charitable objectives.
- 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 informed contributions 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.
- Set the direction for, and coordinate support and insights from, relevant 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.
- Work collaboratively with colleagues across the CIOT Public Policy directorate (Professional Standards, External Relations and LITRG), providing support where required to ensure the directorate fulfils its objectives.
- Build relationships with colleagues in other professional bodies (particularly the ATT) to ensure effective external engagement takes place.
- Ensure that the members' voice and the wider public voice are considered in technical work when appropriate and that work is evidenced based as far as possible.
- Respond to queries raised by members and the wider public in accordance with the CIOT policy on providing replies set out at <https://www.tax.org.uk/contact-the-technical-team>.

Job impact – the desired impact of this role is that:

1. The CIOT's technical submissions and wider engagement reflect our charitable objectives, implement agreed strategies, are made timeously, and are recognised as being of the highest quality and impartiality. They are delivered by taking into consideration their target audience, what to deliver and the means/how to deliver it, as well as ensuring investment in pieces of work is prioritised and proportionate to the desired impact (in line with the public awareness strategy).
2. The CIOT's technical team and committees operate effectively, contain volunteers with a broad range of experience, and make adequate provision for succession.
3. The profile of the CIOT's technical work is raised.
4. The CIOT's technical resources are used in the most effective manner.

Skills needed to fulfil the role

Knowledge and experience

- At least five years' practical experience of personal tax advisory work including (but not limited to):
 - Domicile and residence
 - Capital gains tax
 - Inheritance tax
 - Trust taxation
 - Income tax on trading / professional income
 - Income from owner-managed-businesses
 - Investment income
- A working knowledge of tax compliance relating to the above areas.
- Ability to communicate complex tax matters, both verbally and in writing, in a manner understandable by the target audience.

Functional/technical skills

- Membership of the CIOT or STEP, Chancery Bar or Revenue Bar or otherwise qualified to an equivalent level (e.g. ATT or other professional qualification + demonstrable experience).
- Excellent communication skills, to ensure that written and verbal communication is clear, concise, and effectively presented.
- Ability to analyse, critique and condense large amounts of feedback from multiple sources into clear and understandable messaging.
- Thoroughly research tax technical issues, converting such research into technically accurate, evidenced, and balanced outputs and options.
- Work to tight deadlines without loss of accuracy.
- Apply your knowledge to assess and evaluate new proposals or to come up with new ideas for change.
- Competent use of Microsoft Office Apps – Outlook, Teams, Word, and Excel etc.

Interpersonal and work management Skills

- Communicate professionally, confidently, and effectively with others including external stakeholders (which may include the media).
- Assimilate and clearly articulate the CIOT's agreed position – confidence to test and challenge and seek further explanation and evidence from experts.
- Exercise judgement and respect boundaries, to ensure that output is well received, balanced, factual, and non-political.
- Work independently and using your own initiative, but with an appreciation that your work needs to fit CIOT's overall objectives so may be subject to change/direction as needed.
- Recognise when team working is required and where potential problem areas need to be escalated.
- Support and participate in objectives of your team and across the directorate where appropriate, including contributing to team processes and taking a proactive approach to ideas for continuous improvement.
- Manage your time and identify priorities to balancing competing deadlines.

Salary & Benefits package

Salary

The salary for this role is £77,000 to £80,681 per annum, 35 hours per week. The role is a remote role with occasional office attendance and travel for meetings and events as required.

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 Jepson at sjepson@ciot.org.uk for advice.

The deadline for applications is midday Tuesday 17 June.

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 sjepson@ciot.org.uk, or by calling HR on 0207 3400563. 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.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation email. This is a two-stage interview process. First stage interviews are on 30 June to 2 July (online via Teams). An assessment will be completed prior to second stage interviews and details will be confirmed nearer the time. Second stage interviews will be 9 and 10 July face to face at our Monck Street offices in London.

If you do not confirm your attendance, 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.

