



# Application Pack

## Dundee Citizens Advice Bureau

Level 4, Central Library, Wellgate, Dundee, DD1 1DB

*Scottish Charity No. SC011657*

*Company Limited by Guarantee SC169302*

*Authorised and Regulated by the Financial Conduct Authority – FRN617450*



June 2026

Dear Applicant

### **Post of Triage Assistant**

Thank you for your enquiry about the above post.

At Dundee Citizens Advice Bureau, we recognise the importance of supporting staff wellbeing and maintaining a healthy work-life balance. We offer hybrid working arrangements, a flexible 33-hour working week across 4 or 5 days, no weekend working and a generous annual leave entitlement of 10 weeks per year, alongside opportunities for learning, development and progression.

Enclosed you will find the job description, person specification, equality statement and background information about the Bureau.

In determining which applicants will be invited to interview, the panel will assess how closely applications match the person specification. It is therefore important that you use this as a guide when completing your application.

Interviews are expected to be held during the week commencing 6 July 2026. If you have not heard from us by this time, please assume that your application has been unsuccessful on this occasion.

In the interest of public safety, the successful applicant will be required to disclose criminal history information.

Applications should be returned digitally where possible. If you require information in an alternative format or need support with your application, please contact Lisa Brand at [Lisa.Brand@DundeeCAB.org.uk](mailto:Lisa.Brand@DundeeCAB.org.uk).

At Dundee Citizens Advice Bureau, you will join a values-driven organisation where your work can make a real difference to people across Dundee.

We look forward to receiving your application by the closing date of 29 June 2026.

Yours sincerely,

Lisa Brand  
**Support Team Lead**

## About Us

Dundee Citizens Advice Bureau has been supporting people across the city since 1940, providing free, confidential and impartial advice to help people understand their rights, navigate complex systems and overcome challenges.

We are a busy, values-driven organisation with a team of 24 staff and 18 volunteers committed to improving lives and reducing inequality. In 2025, we supported 4,604 clients with 9,688 issues including to debt, benefits, housing, energy, employment and consumer rights, helping to secure £1.92 million in financial gains for clients.

## About the Triage Service

Our triage service is the first point of contact for many clients and plays a critical role in ensuring people are listened to, their needs are understood and they are directed to the most appropriate support.

In 2025, the triage service supported more than 79% of all clients accessing the Bureau and handled 4,426 client contacts, highlighting its vital role in delivering an accessible, responsive and client-focused advice service.

Triage enables us to manage demand effectively while maintaining a high standard of service. By identifying urgency, complexity and risk at an early stage, we can prioritise cases appropriately and ensure clients receive the right help at the right time.

## Job Description & Person Specification

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### Position Details

**Job Title:** Bureau Triage Assistant

**Location:** Dundee CAB, Level 4, Wellgate Centre, Dundee, DD1 1DB

**Salary:** £23,664 per annum

**Hours:** 33 hours per week over 4 or 5 days

**Contract Type:** Fixed term until 31 March 2027, subject to ongoing funding

**Reports to:** Support Team Lead

**Closing Date:** 29 June 2026

**Interviews:** Week commencing 6 July 2026

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### Purpose of the Role

To provide a welcoming and effective first point of contact for clients accessing the Bureau's services. The role involves gathering key information, assessing needs and ensuring individuals are directed to the most appropriate support.

This is a busy frontline role requiring effective communication skills, sound judgement and the ability to respond to a wide range of client needs. The postholder will often be the first point of contact for clients and plays a key role in ensuring people receive the right support at the right time.

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### Key Responsibilities

#### Client-Facing Duties

- Provide a first point of contact for clients via telephone and in person
- Use sensitive listening and questioning skills to understand client needs
- Identify the urgency and nature of client issues and any support needs
- Ensure clients are directed to the most appropriate service or support
- Demonstrate empathy while maintaining professional boundaries
- Maintain a positive and professional image of the Bureau.

### **Appointment Management & Administration**

- Coordinate and organise client appointments using an electronic appointment calendar system
- Provide administrative support to help the service run smoothly
- Record, update and maintain accurate information on the case management system for continuity of casework, information retrieval, statistical monitoring and report preparation
- Draft routine correspondence and take notes at meetings as required
- Maintain organised filing systems while ensuring discretion and security of confidential information.

### **Data Management & Reporting**

- Record and maintain accurate statistical information
- Support reporting requirements and data returns
- Ensure compliance with GDPR and data protection standards.

### **Team Working & Communication**

- Collaborate with colleagues and volunteers and relevant services to support clients
- Refer complex or urgent cases appropriately
- Contribute to the effective running of the service.

### **Supporting the Service**

- Contribute to the smooth running of the service
- Support promotion of Bureau services
- Provide feedback to help inform service development and improvement
- Participate in relevant social policy work.

### **Professional Development**

- Participate in training and development
- Attend team and staff meetings
- Maintain a commitment to continuous learning.

### **General Responsibilities**

- Work within Citizens Advice principles and quality standards
  - Comply with organisational policies and procedures
  - Work flexibly to meet service and client needs
  - Undertake additional duties appropriate to the role.
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### What Success Looks Like

- Clients feel welcomed, listened to and supported
- Clients are directed to the right service efficiently
- Records are accurate, consistent and up to date
- Appointments are well managed and service runs smoothly
- The service is accessible, responsive and well organised.

### What We Offer

- Hybrid working arrangements
- Flexible 33-hour working week across 4 or 5 days
- No weekend working
- Generous annual leave entitlement (10 weeks per year)
- Office closure over the Christmas and New Year period
- Employer pension contributions
- Supportive team environment
- Comprehensive induction and ongoing training
- Opportunities for development and progression
- The opportunity to make a meaningful difference in the community.

### Equal Opportunities Statement

Dundee Citizens Advice Bureau is an equal opportunities employer and welcomes applications from all sections of the community.

### PERSON SPECIFICATION

CRITERIA	ESSENTIAL	DESIRABLE
<b>Experience</b>	Proven experience providing administrative support and maintaining office systems Demonstrated customer service skills Experience of telephone and reception work	Minimum 1 years' experience working within an office environment.  Experience working in advice services or voluntary sector

CRITERIA	ESSENTIAL	DESIRABLE
<b>Communication Skills</b>	<p>Ability to communicate effectively in writing and verbally, including by telephone</p> <p>Strong people skills in a customer-facing role</p> <p>Ability to write clearly and accurately, including drafting routine correspondence</p> <p>Capacity to empathize with clients while maintaining professional boundaries</p>	<p>Experience communicating with diverse client groups.</p> <p>Knowledge of accessible communication techniques</p>
<b>IT &amp; Digital Skills</b>	<p>Competent knowledge of Microsoft Office applications (Word, Excel, Outlook)</p> <p>Ability to learn and use a range of software systems daily</p> <p>Competent knowledge of social media platforms</p>	<p>Experience with case management systems</p> <p>Experience with appointment booking systems</p>
<b>Numeracy &amp; Literacy</b>	<p>High level of numeracy and literacy</p> <p>Ability to capture, collate, and analyse statistical information accurately</p>	<p>Experience producing reports and data analysis</p>
<b>Problem-Solving &amp; Organization</b>	<p>Ability to identify and resolve problems quickly and efficiently</p> <p>Excellent time management skills</p> <p>Ability to ask effective questions and assess client needs</p> <p>Organised approach to all areas of work, including recording and filing</p>	<p>Experience working in fast-paced environment with competing priorities</p>

CRITERIA	ESSENTIAL	DESIRABLE
<b>Working Style</b>	<p>Ability to work on own initiative and prioritize workload effectively</p> <p>Ability to work under pressure and manage challenging situations</p> <p>Commitment to a team-working approach</p> <p>Dependable, reliable, trustworthy and approachable</p> <p>Flexible approach to tasks with a positive attitude</p>	
<b>Knowledge &amp; Understanding</b>	<p>Understanding of the issues that affect clients and their impact on individuals and families</p> <p>Clear understanding of excellence in service delivery</p> <p>Understanding of and commitment to the aims and principles of the Citizens Advice service</p> <p>Commitment to the Bureau's policies and procedures</p> <p>Support for the principle of volunteering</p>	<p>Knowledge of welfare benefits, housing, debt, or employment issues</p> <p>Understanding of equality, diversity, and inclusion principles</p>
<b>Compliance &amp; Standards</b>	<p>Ability to work within required statutory standards</p> <p>Understanding of and commitment to confidentiality and data protection</p> <p>Knowledge of health and safety legislation</p>	
<b>Availability &amp; Flexibility</b>	<p>Able to work flexible hours as required by the service and the needs of clients and the Bureau</p>	

CRITERIA	ESSENTIAL	DESIRABLE
<b>Personal Attributes</b>	Willingness to learn and develop new skills Ability to use initiative Professional and non-judgmental approach	

