



## Dundee Citizens Advice Bureau

### Recruitment Pack

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Date: 7<sup>th</sup> December 2020

Dear Applicant

**BUREAU TRIAGE SUPPORT ASSISTANT**

Thank you for your enquiry about the above post.

You will find enclosed an application form, equal opportunities monitoring form and some background information about the bureau.

In determining which applicants will be interviewed the Interview Panel will have regard to applicants who best fit the person specification so it is important that you to use this as a guide when completing the application form we also require a personal statement

We regret that we are unable to acknowledge receipt of completed application forms unless a stamped addressed envelope is enclosed with your application.

We look forward to receiving your application by the closing date is the **18<sup>th</sup> December 2020** and we would ask that you provide a telephone number where we can contact you day and/or evening. If you are selected for interview, these will be held on the **21<sup>st</sup> December 2020**

Yours sincerely

Tracy McNally  
Director



## DUNDEE CITIZENS ADVICE BUREAU

### Information to applicants

Citizens Advice Bureaux are the major providers of holistic information, advice and assistance, operating from 205 service points that cover Scotland from the islands to the City Centres.

The Bureaux are staffed by trained volunteer advisers under the supervision of the manager, and provide responses to clients' enquiries covering the whole range of social issues. Despite being a generalist service, most enquiries are concerned with matters related to problems of poverty and deprivation.

These local offices are wholly independent and receive funding from their respective local Councils in the form of annual grants. Bureaux are autonomous bodies under the control of a local Board of Directors. These consist of representatives of local statutory and voluntary agencies, elected members of the public, and staff representatives.

All bureaux are members of Citizens Advice Scotland (the Scottish Association of CABx), and as such must meet specific conditions of membership related to standards of service and other matters. The Association receives financial support from central government through the Department of Trade and Industry.

Enquiries are across a wide range of fields, and clients expect high quality advice and assistance (including representation at tribunals and in Court when appropriate) on what are, at times, highly complex matters. The main enquiries at the present time relate to problems with welfare benefits and money; employment; goods and services; housing; and family and personal situations.

All CAB posts demand a high level of commitment and will involve a flexible approach to working. No overtime payments are made, but time off in lieu is given. Expenses are reimbursed for travel related to approved duties.

### **Dundee Citizens Advice Bureau**

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

Scottish charity SCO11657 and company limited by guarantee No. SC169302  
Authorised and regulated by the Financial Conduct Authority FRN 617450

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## Job description

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### Key responsibilities

- > To attend to clients on the phone and in person, using sensitive listening and questioning skills.
- > To explore clients' circumstances, support needs and access channel preferences considering language barriers, accessibility needs, and issues around digital access and ability
- > To provide a triage service
- > To co-ordinate and organise appointment using an electronic appointment calendar
- > Refer to manager for help with emergencies
- > To liaise where appropriate with bureau staff and other relevant agencies.
- > To record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
- > To adhere to company principles and to ensure that all work meets quality standards and the requirements of the funders
- > Contribute to overall efficiency and quality of processes and procedures
- > Provide information for project reports
- > Carry out other duties as specified by the Manager and required by the needs of the post.
- > Promoting the service through social media
- > Provide administration support to ensure the smooth running of the bureau
- > Present a positive image of the Bureau at all times.
  
- > Form effective working relations and networking with other organisations and stakeholders ensuring collaborative approach in service delivery.
  
- > Assist in Identify personal strengths and weaknesses as well as identifying personal training needs
- > Attend in-house and external training courses as appropriate
- > Attend team and staff meeting as required.

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the Director.

## Person specification

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<b>Knowledge and understanding</b>	<ul style="list-style-type: none"> <li>&gt; Proven experience to provide administration support and to maintain office systems</li> <li>&gt; Proven customer service skills</li> <li>&gt; Proven experience of telephone/reception work</li> <li>&gt; Minimum 3 years' experience working within an office environment would be desirable</li> </ul>
<b>Communication, numeracy and ICT skills</b>	<ul style="list-style-type: none"> <li>&gt; Ability to communicate effectively with people in writing and verbally including by telephone</li> <li>&gt; Good interpersonal skills in a customer facing role</li> <li>&gt; Able to empathise with clients while ensuring required action is advised, including directing clients to other sources of advice or support</li> <li>&gt; Ability to write clearly and accurately, including drafting routine correspondence and taking notes of meetings</li> <li>&gt; Commitment to team working approach</li> <li>&gt; High level of numeracy and literacy, with an ability to capture and collate statistical information for analysis</li> <li>&gt; Demonstrate a competent knowledge of Microsoft applications and an ability to learn and use a range of other software on a daily basis</li> <li>&gt; Demonstrate a competent knowledge of social media packages</li> </ul>
<b>Generic cognitive skills, such as evaluation or analysis</b>	<ul style="list-style-type: none"> <li>&gt; Ability to identify and resolve problems quickly and efficiently</li> <li>&gt; Good time management skills</li> <li>&gt; Good interview and diagnostic skills</li> <li>&gt; Ability to use initiative</li> </ul>
<b>Autonomy &amp; accountability</b>	<ul style="list-style-type: none"> <li>&gt; Ability to work on own initiative, prioritise work and handle pressure</li> <li>&gt; Dependable, reliable, trustworthy and approachable</li> <li>&gt; Able to work flexible hours as required by the service and the needs of the clients and the bureau</li> <li>&gt; Possess and organised approach to all areas of work, including recording and filing of work, while being cognisant of the need for discretion and security of information</li> </ul>
<b>Practice; applied knowledge, skills and understanding</b>	<ul style="list-style-type: none"> <li>&gt; Flexible approach to tasks and a positive attitude</li> <li>&gt; Able to work within required statutory standards</li> <li>&gt; Support the principal of volunteerism</li> </ul>

	<ul style="list-style-type: none"> <li>&gt; <b>Clear understanding of the excellence in service delivery</b></li> <li>&gt; <b>Willingness to learn and develop new skills</b></li> <li>&gt; <b>Understanding of the issues that affect clients and how it affects individuals and their families</b></li> <li>&gt; <b>Knowledge of health and safety legislation</b></li> </ul>
<b>Values and attitudes</b>	<ul style="list-style-type: none"> <li>&gt; <b>An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of Bureau.</b></li> </ul>

**Additional requirements**

- > The post is subject to the receipt of a satisfactory Basic Disclosure Certificate
- > The post is subject to the disclosure of criminal history information

**Please complete all sections of this form, including candidate details, acceptance of our privacy notice for job applications, reference details and a declaration of your right to work in the UK.**

To apply for this role, please complete this application form and send it to [Lucy.marshall@dundeecab.casonline.org.uk](mailto:Lucy.marshall@dundeecab.casonline.org.uk)

In order for your application to be considered, please ensure you complete all sections of this form. Please do not send in your CV as we will only consider your completed application form.

**Sections**

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## Candidate Details

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Please complete your details below:

Title	
Full name	
Previous name(s) if applicable (please include dates)	
Address	
Email address	
Contact telephone number	
Role applied for	Triage Support Assistant
Where did you see the job advertised?	

## General Data Protection Regulation

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Dundee Citizens Advice Bureau is aware of its obligations under the General Data Protection Regulation (GDPR) and is committed to processing your data securely and transparently. Our 'Privacy Notice for Job Applicants' sets out, in line with GDPR, the types of data that we collect and hold on you as a job applicant, how we use that information, how long we keep it for and other relevant information about your data. It is important that you read this notice so that you are aware of how and why we are using your data. Please check the box below to confirm that you have done so.

I confirm that I have read, understood and agree to the Privacy Notice for Job Applicants.

## References

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Any offers of employment with Dundee Citizens Advice Bureau are conditional upon receipt of satisfactory references. Please provide below the names and contact details of at least two referees **covering your last 5 years of employment** (include additional boxes if necessary).

If you have been in full-time education during this time, please provide details of where an academic reference can be obtained.

For each reference, please detail the following information:

### Referee 1

<b>Name of referee</b>	
<b>Job title of referee</b>	
<b>Organisation</b>	
<b>Address</b>	
<b>Email Address</b>	
<b>Contact Telephone Number</b>	
<b>Dates employed</b>	

### Referee 2

<b>Name of referee</b>	
<b>Job title of referee</b>	
<b>Organisation</b>	
<b>Address</b>	
<b>Email Address</b>	
<b>Contact Telephone Number</b>	
<b>Dates employed</b>	

Please note that we will not contact any referees until an offer of employment has been made and your authorisation has been obtained.

**Right to Work in the United Kingdom**

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All employees must be able to demonstrate that they are legally entitled to work in the United Kingdom.

In order to apply for employment with Dundee Citizens Advice Bureau, you must declare that you have the right to work in the United Kingdom and that, if successful, you will be able to provide the necessary documentation (typically a passport or a birth certificate, together with your National Insurance Number).

By completing this application form, you are declaring that you are legally entitled to work in the United Kingdom.

**Please state below, by selecting the statement that applies to you, if there are any restrictions or limitations on your legal right to work in the United Kingdom.**

- I confirm that I have the right to work in the United Kingdom without restriction.
  
- I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I have no restrictions or limitations on my Visa.
  
- I confirm that I have the right to work in the United Kingdom until \_\_\_\_\_ and I hold the appropriate Visa documentation to confirm this right. I am restricted to (please detail any restrictions or limitations on working in the UK):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Employment History

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Please give details of your employment (paid or unpaid) starting with your present/most recent employer and working backwards. Please explain any employment breaks.

### Present or most recent employer:

Name, full address & telephone number of employer	
Job title	
Dates employed: from (MM/YY) to (MM/YY)	
Final salary	
Notice period (if applicable)	
Reason for leaving	

Please give a brief outline of your main responsibilities and achievements:

### Previous employers: Continue on separate sheet and include additional boxes if necessary

Name, full address & telephone number of employer	
Job title	
Dates employed: from (MM/YY) to (MM/YY)	
Notice period (if applicable)	
Reason for leaving	

Please give a brief outline of your main responsibilities and achievements:

Name, full address & telephone number of employer

Job title

Dates employed: from (MM/YY) to (MM/YY)

Notice period (if applicable)

Reason for leaving

Please give a brief outline of your main responsibilities and achievements:

If you have had any breaks in your employment (for example family commitments, travel and periods of unemployment) please give the dates to and from and a full explanation.

<b>Dates</b>	<b>Reason for break</b>

**Qualifications**

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Please give details of your qualifications below, beginning with the most recent.

**Education:**

Dates	Institution name	Qualification	Grade

**Membership of professional bodies:**

Date joined	Professional body	Category of membership

**Additional qualifications:**

Date completed	Course	Brief description

## Personal statement

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In this section we would like you to give your reasons for applying for this post. Bearing in mind the job description, please provide examples demonstrating what experience, skills and qualities you would bring to this job.

**Personal statement (Continued)**

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## Declaration

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I confirm that the information given on this form is, to the best of my knowledge, true and complete. I understand that any deliberate attempt to provide false information to obtain employment is a serious misrepresentation and will lead to rejection, or if employed, dismissal and is likely to constitute a criminal offence.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Print name: \_\_\_\_\_

Please return completed application to:-

Lucy Marshall  
Dundee Citizens Advice Bureau  
Central Library, Level 4  
Wellgate Centre  
DUNDEE  
DD1 1DB

Email: [lucy.marshall@dundeecab.casonline.org.uk](mailto:lucy.marshall@dundeecab.casonline.org.uk)

**The Dundee Citizens Advice Bureau is committed to equal opportunities both in service provision and employment.**

**Charity number: SCO11657**

**Charity name: Dundee Citizens Advice Bureau**

## **Privacy notice for job applicants**

Dundee CAB is aware of its obligations under the General Data Protection Regulation (GDPR) and is committed to processing your data securely and transparently. This privacy notice sets out, in line with the GDPR, the types of data that we will collect and hold on you as a job applicant. It also sets out how we will use that information, how long we keep it for and other relevant information about your data.

It is important that you read this notice so that you are aware of how and why we are using your data.

This notice does not form part of any contract of employment or other contract to provide services. We may update this notice at any time.

### **Data controller details**

Dundee CAB is a data controller, meaning that it determines the processes to be used when using your personal data. Our contact details are as follows: Tracy McNally, Dundee Citizens Advice Bureau, Central Library, Level 4, Wellgate Centre, Dundee, DD1 1DB.

### **Data protection principles**

In relation to your personal data, we will:

- process it fairly, lawfully and in a clear, transparent way
- collect it only for reasons that we find proper for the purposes of making recruitment and selection decisions and for ensuring that our equal opportunities obligations are met
  - only use it in the way that we have told you about
  - ensure it is correct and up to date
  - keep it only for as long as we need it
  - process it in a way that ensures it will not be used for anything that you are not aware of or have not consented to (as appropriate)
  - process it in a way that ensures it will not be lost or accidentally destroyed

### **Types of data we process**

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data).

We will hold the following types of data about you, during the recruitment and selection process:

- your personal details including your name, title, address, personal email address, personal phone numbers
- whether or not you have a disability, in order that we can make suitable adjustments to our recruitment and selection processes
- information included on your application form, including references, education history and employment history
- information used for equal opportunities monitoring purposes, which will be held separately from any other documentation provided by you and which will not be attributable to you
- documentation relating to your right to work in the UK

### **How we collect your data**

We collect data about you in a variety of ways, this will include the information you would normally provide in an application form or a job application cover letter, or notes made by our recruitment panel during a recruitment interview. Further information will be collected directly from you when you complete forms at the start of your employment, for example, your bank and emergency contact details. Other details may be collected directly from you in the form of official documentation such as your passport or other right to work evidence.

In some cases, we will collect data about you from third parties, such as from former employers when gathering references.

Personal data is kept in personnel files and IT System within the Clackmannanshire Citizens Advice Bureau.

### **Why we process your data**

The law on data protection allows us to process your data for certain reasons only:

- in order to perform the employment contract that we are party to
- in order to carry out legally required duties
- in order for us to carry out our legitimate interests
- to protect your interests and
- where something is done in the public interest.

All of the processing carried out by us falls into one of the permitted reasons. Generally, we will rely on the first three reasons set out above to process your data.

We need to collect your personal data to ensure we are complying with legal requirements such as:

- carrying out checks in relation to your right to work in the UK
- making reasonable adjustments for disabled employees.

We also collect data so that we can carry out activities which are in the legitimate interests of Dundee CAB. We have set these out below:

- making decisions about who to offer employment to
- making decisions about salary and other benefits
- assessing training needs
- dealing with legal claims made against us

If you are unsuccessful in obtaining employment, we may seek your consent to retain your data in case the outcome of the recruitment process changes or other suitable job vacancies arise at Dundee CAB for which we think you may wish to apply. You are free to withhold your consent to this and there will be no consequences for doing so.

### **Special categories of data**

There are "special categories" of more sensitive personal data which require a higher level of protection. Special categories of data are data relating to:

- information about your health, including any medical conditions
- information about your sex life or sexual orientation
- information about your race, ethnicity, religious beliefs or political opinions

- information about trade union membership
- genetic and biometric data.

We must process special categories of data in accordance with more stringent guidelines. Most commonly, we will process special categories of data when the following applies:

- you have given explicit consent to the processing
- we must process the data in order to carry out our legal obligations
- we must process data for reasons of substantial public interest
- you have already made the data public.

We will use your special category data:

- for the purposes of equal opportunities monitoring
- in order to make appropriate adjustments to the recruitment and selection process if you have a disability

We do not need your consent if we use special categories of personal data in order to carry out our legal obligations or exercise specific rights under employment law. However, we may ask for your consent to allow us to process certain particularly sensitive data. If this occurs, you will be made fully aware of the reasons for the processing. As with all cases of seeking consent from you, you will have full control over your decision to give or withhold consent and there will be no consequences where consent is withheld. Consent, once given, may be withdrawn at any time. There will be no consequences where consent is withdrawn.

### **Criminal conviction data**

We will only collect criminal conviction data where it is appropriate given the nature of your role and where the law permits us to do so. This data will usually be collected at the recruitment stage, however, may also be collected during your employment should you be successful in obtaining employment. We use criminal conviction data to determine your suitability for the post and to provide a safeguard for our clients and volunteers.

### **If you do not provide your data to us**

One of the reasons for processing your data is to allow us to carry out an effective recruitment process. Whilst you are under no obligation to provide us with your data, if you do not provide it we may not be able to process your application.

### **Sharing your data**

Your data will be shared with colleagues within Dundee CAB where it is necessary for them to undertake their duties with regard to recruitment and selection. This includes, for example, trustees from our board of directors, the bureau manager, any other individuals who are involved in screening your application and interviewing you.

Your data will be shared with third parties if you are successful in your job application. In these circumstances, we will share your data in order to obtain references as part of the recruitment process. We may also share your data with Disclosure Scotland, if criminal record checks are required for the post in question.

We do not share your data with bodies outside of the European Economic Area.

### **Protecting your data**

We are aware of the requirement to ensure your data is protected against accidental loss or disclosure, destruction and abuse. We have implemented processes to guard against such. Data is held in locked filing cabinet in the Managing Directors office.

Where we share your data with third parties, we provide written instructions to them to ensure that your data is held securely and in line with GDPR requirements. Third parties must implement appropriate technical and organisational measures to ensure the security of your data.

### **Data Retention / How long we keep your data for**

In line with data protection principles, we only keep your data for as long as we need it for and this will depend on whether or not you are successful in obtaining employment with us.

If your application is not successful, we will keep your data for three months after the recruitment exercise ends. If you have consented to our retaining your data in case future vacancies arise, we will keep it for a maximum of six months.

At the end of this period, we will delete or destroy your data, unless you have already withdrawn your consent to our processing of your data in which case it will be deleted or destroyed upon your withdrawal of consent.

If your application is successful, your data will be kept and transferred to the systems we administer for employees. We have a separate privacy notice for employees, which will be provided to you.

### **Automated decision making**

No decision about you, which may have a significant impact on you, will be made solely on the basis of automated decision making - i.e. where a decision is taken about you using an electronic system without human involvement.

### **Your rights in relation to your data**

The law on data protection gives you certain rights in relation to the data we hold on you. These are:

- The right to be informed. This means that we must tell you how we use your data, and this is the purpose of this privacy notice
- The right of access. You have the right to access the data that we hold on you. To do so, you should make a subject access request
- The right for any inaccuracies to be corrected. If any data that we hold about you is incomplete or inaccurate, you are able to require us to correct it
- The right to have information deleted. If you would like us to stop processing your data, you have the right to ask us to delete it from our systems where you believe there is no reason for us to continue processing it
- The right to restrict the processing of the data. For example, if you believe the data we hold is incorrect, we will stop processing the data (whilst still holding it) until we have ensured that the data is correct
- The right to portability. You may transfer the data that we hold on you for your own purposes
- The right to object to the inclusion of any information. You have the right to object to the way we use your data where we are using it for our legitimate interests

- The right to regulate any automated decision-making and profiling of personal data. You have a right not to be subject to automated decision making in way that adversely affects your legal rights.

Where you have provided consent to our use of your data, you also have the unrestricted right to withdraw that consent at any time. Withdrawing your consent means that we will stop processing the data that you had previously given us consent to use. There will be no consequences for withdrawing your consent. However, in some cases, we may continue to use the data where so permitted by having a legitimate reason for doing so.

If you wish to exercise any of the rights explained above, please contact Tracy McNally, Director.

### **Making a complaint**

The supervisory authority in the UK for data protection matters is the Information Commissioner (ICO). If you think your data protection rights have been breached in any way by us, you are able to make a complaint to the ICO.

# Equality and Diversity Monitoring Form

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Completing this form will help Dundee Citizens Advice Bureau monitor equality and diversity statistics. This information is not part of your application and will not be used in any part of the selection process. The information will be stored anonymously and confidentially.

Please do not put your name anywhere on this form. Return it separate from your other application documents by emailing it to:  
*tracy.mcnally@dundeecab.casonline.org.uk*

***Position applying for: Bureau Triage support assistant***

## ***Gender***

**Which one of the following best describes your gender?**

- Male
- Female
- Prefer not to say

Prefer \_\_\_\_\_ to self-describe:  
.....

## ***Gender Identity***

Is your gender identity the same as the sex you were assigned at birth?

- Yes
- No
- Prefer not to say

## ***Sexual Orientation***

Which of the following best describes your sexual orientation?

- Bisexual
- Gay man
- Gay Woman / Lesbian
- Heterosexual / Straight
- Prefer not to say

Prefer \_\_\_\_\_ to self-describe:  
.....

**Disability**

Do you consider yourself to be disabled?

- Yes
- No
- Prefer not to say

**Age**

- 16-24                       25-34                       35-44
- 45-54                       55-65                       65+
- Prefer not to say

**Ethnicity**

Please tick the box for the group to which you perceive you belong:

- Arab
  
- Asian/Asian British: Indian
- Asian/Asian British: Pakistani
- Asian/Asian British: Bangladeshi
- Asian/Asian British: Chinese
- Other Asian:  
.....
  
- Black/Black British: African
- Black/Black British: Caribbean
- Other Black/Black British:  
.....
  
- Mixed: White and Black Caribbean
- Mixed: White and Black African
- Mixed: White and Asian
- Other Mixed:  
.....
  
- White: British
- White: Irish
- White: Gypsy or Irish Traveller
- Other White:  
.....



Any other ethnic group:

.....

Prefer not to say

**Religion and Belief**

Buddhist

Christian

Hindu

Jewish

Muslim

Non-religious

Sikh

Prefer not to say

Other religion or belief:

.....

**Caring Responsibilities**

Do you have any caring responsibilities? (please tick all that apply)

None

Primary carer of a child or children (under 18 years)

Primary carer of a disabled child or children

Primary carer or assistant for a disabled adult (18 years and over)

Primary carer or assistant for an older person or people (65 years and over)

Secondary carer (another person carries out main caring role)

Prefer not to say