



Job Description – Duty Officer

Job Title: Duty Officer

Salary: £26,620 - £28,983

Responsible to: Team Manager

Key Relationship: General Manager

Location: Cardiff (primarily office-based)

Main Purpose of the Role

The Duty Officer plays a key operational role in ensuring the smooth running of the Friendly Trust's office duty function. The postholder will be the designated lead for Office Duty sessions, acting as the first point of contact for calls, visitors, and day-to-day operational queries. The role also provides structured support to a Trust Officer managing a caseload of Service Users requiring lower levels of support, assisting with administrative casework, financial monitoring tasks, and maintaining accurate records.

This post bridges administrative and frontline service delivery functions, enabling Trust Officers to focus on complex casework while maintaining high standards of responsiveness and record keeping.

Key Responsibilities

1. Office Duty (Primary Function)

- Take responsibility for the delivery of Office Duty sessions in line with the Office Duty Procedure.
- Manage incoming telephone calls, enquiries, and visitors, ensuring all interactions are recorded accurately.
- Maintain and update the Office Duty diary, including:
 - Recording calls, visitors, and actions taken
 - Logging outstanding actions for follow-up
 - Ensuring continuity between sessions
- Use CasparGov to record duty activity promptly and accurately.
- Monitor planned and ad hoc cash collections, ensuring compliance with The Friendly Trust's policies and procedures, checking requirements, and promptly identifying and escalating any issues or discrepancies.
- Carry out cash tin checks and ensure appropriate balances for ongoing sessions.
- Liaise with the Duty Team Manager where queries require escalation.

2. Service User Support

- Support a designated Trust Officer in managing a caseload of Service Users requiring lower levels of support
- Assist with routine financial administration tasks such as:
 - Monitoring transactions and basic budgeting support
 - Preparing information for review by the Trust Officer
- Maintain accurate records of activity in line with organisational and legal requirements.
- Draft basic correspondence and follow up routine requests.

3. Administrative and Operational Support

- Provide administrative support aligned with organisational systems and processes.
- Assist with:
 - Data entry and maintaining records
 - Processing documentation and correspondence
 - Supporting internal reporting and statistics
- Contribute to efficient office systems and processes.
- Support meeting preparation or coordination where required.

4. Communication and Team Working

- Act as a professional first point of contact for Service Users, families, and external professionals.
- Work collaboratively with Trust Officers, Admin, and managers to ensure seamless service delivery.
- Escalate queries appropriately while maintaining ownership of routine enquiries.

5. Organisational Contribution

- Work in line with the Friendly Trust's values, policies, and procedures.
- Contribute to a positive, inclusive, and supportive working environment.
- Maintain confidentiality and comply with GDPR and safeguarding requirements.
- Undertake other duties appropriate to the role.

Person Specification

Essential Skills and Experience

- Excellent verbal and written communication skills, with the ability to communicate clearly, professionally and sensitively with Service Users, family members, colleagues and external agencies.
- Strong interpersonal, telephone and customer service skills, with a friendly, approachable and professional manner.
- Proven administrative experience, with strong organisational skills and the ability to manage a varied workload effectively.
- Ability to prioritise tasks, work to deadlines, manage competing demands and respond positively to changing priorities.

- Excellent attention to detail, with the ability to maintain accurate records and manage information confidentially.
- Experience of data entry, maintaining electronic databases and record management systems.
- Competent user of Microsoft 365, including Outlook, Word, Excel and Teams, and confident using databases and other IT systems.
- Ability to work independently using initiative, as well as collaboratively within a team.
- Positive, flexible and proactive approach to work.
- Empathy, patience and the ability to work sensitively and respectfully with vulnerable people and individuals from a wide range of backgrounds.
- Commitment to equality, diversity and inclusion, professional standards, confidentiality and data protection requirements.

Desirable Skills and Experience

- Experience working within the charity, voluntary, health or social care sectors.
- Experience of handling calls, front-line enquiries, reception duties or customer-facing services.
- Knowledge of issues affecting people with learning disabilities and their families.
- Knowledge of welfare benefits, financial administration or related support services.
- Experience of using case management, CRM or client record systems.
- Knowledge of CASPAR Gov or similar case management software.
- Experience of supporting the production of reports, statistics, monitoring information or management data.
- Experience of coordinating office systems, facilities or administrative processes.
- Basic financial administration experience, including invoice processing, cash handling and record keeping.
- Knowledge of information governance and records management practices.
- Good record of punctuality, reliability and attendance.

Personal Attributes

- Professional, trustworthy and dependable.
- Solution-focused, with a willingness to learn, develop and adapt.
- Able to maintain composure and professionalism when handling sensitive or challenging enquiries.
- Committed to supporting The Friendly Trust's mission, values and person-centred approach.
- Demonstrates sound judgement, discretion and a high level of integrity.

Application Process

The Friendly Trust is committed to fair, transparent, and safer recruitment practices. Our recruitment and selection process will be carried out in line with our Recruitment Policy and relevant employment and safeguarding legislation.

How to apply

- Applicants are asked to submit a CV and a supporting statement to recruitment@friendlytrust.org.uk explaining how they meet the Person Specification for the role by **9am on the 17th August 2026**
- Applicants should provide a full employment history, including any gaps in employment.

Shortlisting

- Shortlisting will be carried out by a recruitment panel using the essential and desirable criteria set out in the Person Specification.
- Shortlisting decisions will be made objectively and without regard to protected characteristics, in line with equality and diversity legislation.

Interviews and assessment

- Shortlisted candidates will be invited to interview by email.
- Interviews will take place the week commencing **24th August 2026**
- Interviews will be conducted by a panel of at least two people, which may include senior staff and/or Trustees.
- The selection process may include additional assessment methods, such as a practical exercise or short presentation, relevant to the role.
- Notes will be taken by panel members to support fair and consistent decision-making.

Appointment and pre-employment checks

- All offers of employment are subject to the receipt of satisfactory references. Two references will be requested, one of which should be from a current or most recent employer.
- The successful candidate will be subject to an Enhanced Disclosure and Barring Service (DBS) check, due to the nature of the role and contact with vulnerable adults.
- Having a criminal record will not automatically prevent appointment. Any disclosures will be considered fairly, confidentially, and proportionately, in line with the Rehabilitation of Offenders Act 1974 and the DBS Code of Practice.

Equality, safeguarding and safer recruitment

- The Friendly Trust is committed to equality of opportunity and actively welcomes applications from people of all backgrounds.
- Appropriate safeguarding considerations will be applied throughout the recruitment process, reflecting our responsibility to protect vulnerable people.
- Information provided as part of the recruitment process will be handled in accordance with UK GDPR and confidentiality requirements.

Equal Opportunities Monitoring

- Applicants will be invited to complete an Equal Opportunities Monitoring Form. This information is collected for monitoring purposes only, is entirely voluntary, and is not shared with the shortlisting or interview panel.
- Monitoring data is used to help the organisation review and improve the fairness and inclusivity of its recruitment practices, in line with equality legislation.

Contact Information

To apply, or for any questions regarding the position, please contact recruitment@friendlytrust.org.uk