



# Guide to Volunteering at Citizens Advice

## Our Service

The CA Service is independent and provides free, confidential and impartial advice to everybody regardless of race, sex, disability, sexuality or nationality. It is the largest advice-giving network in the UK, with over 3,000 outlets and 20,000 volunteers. We help people deal with nearly six million problems every year face-to-face, by phone and email, at our offices, at outreach sessions in places like GP surgeries and courts – even in people’s homes. Our clients and volunteers come from all walks of life. We are committed to providing an independent advice service, and volunteering opportunities, to the whole community.

## The CA Service is based on four principles

- **Independent** – We will always act in the interests of our clients, without influence from any outside bodies
- **Impartial** – We don’t judge our clients or make assumptions about them. Our service is open to everyone, and we treat everyone equally
- **Confidential** – We won’t pass on anything a client tells us – or even the fact that they’ve visited us – without their permission
- **Free** – No-one has to pay for our traditional service but we do offer some additional services that we charge for. For example we now deliver some immigration work that we previously would have referred to a solicitor.

Putting these principles into action enables us to provide a vital service to the millions of people who turn to us for help each year.

## Campaign for changes in policies and services

The Citizens Advice service makes a record of every enquiry brought to them. This adds up to a huge wealth of information about the problems people experience. We work proactively to prevent similar problems happening to others. We use this evidence to highlight the effects that policies have on real people in the real world, and to suggest where improvements can be made to the policies and services of national and local government and businesses. We aim to stop problems at source, using the direct experience of the communities that we serve.

## Why volunteer for us?

Above all, it’s a chance to make a real difference. By volunteering for us you’ll be playing an active part in improving people’s lives and influencing the development of national and local policies and services.

We value our volunteers – we could not provide our service without those who generously give their time to help others. We recognise that volunteers want to grow and develop their role with us. Following completion of our initial training, we encourage ongoing development which may include work with some of our specialist teams.

Some roles are more flexible than others. We’ll do our best to find a role for you that fits in with your interests, and we’ll be as flexible as possible in enabling you to volunteer at the times that suit you best. Full training and support is provided to equip you with the competencies and confidence needed to become part of our team. We also pay travel expenses.

**My name is John, I'm well into my 60s and for most of my working life I've been in the building trade. After a few years of doing very little after retirement I wanted to do something worthwhile. I'd already heard about the CA service but it was whilst accompanying a friend to the service that I decided to find out more about volunteering. I attended an information morning where I found out more about the roles available. I opted for the gateway assessor role and do a couple of days a week. The induction and training sessions were comprehensive and never boring.**

**I'm part of a great team and have made many new friends during my time here. I can't stress how enjoyable and rewarding volunteering here can be. It is beneficial for the volunteers, the service and of course for those needing our help for so many different reasons. I hope that this will encourage some of you to consider joining us as volunteers. It's certainly opened my eyes and made my otherwise empty days very enjoyable and fulfilling.**

**I'm Hannah and I decided to volunteer at Citizens Advice to gain work experience as I am currently in the second year of my law degree. I thought that it would help me to put my learning into practice as well as it looking good on my CV for future employers. However, I've got so much more out of my volunteer work. I find it so rewarding knowing that I am helping people who don't know what to do or how to solve their problems. The work is so varied that it widens your knowledge and I've found that it compliments my university work by putting it into perspective. Everyone within the organisation is friendly and you're learning every day. I would strongly recommend volunteering at Citizens Advice for any student – especially those studying law – as it looks good on your CV, is incredibly rewarding and has confirmed to me that helping others or advice work is definitely something that I want to do as a future career.**



# Volunteer Roles

We have several roles available:

- Digital Assistant
- Initial Adviser (face to face & telephone)
- Full Adviser (face to face & telephone)
- Form Filling Adviser
- Research & Campaigns Worker

Our volunteers work in:

- Newcastle
- Biddulph
- Kidsgrove
- Hanley

<b>Digital assistant</b>	
<p>This role is suitable for anyone with basic IT skills and may be of interest to those with only limited time to volunteer, including people on work experience and placements.</p>	
<b>PURPOSE OF THE ROLE</b>	
<ul style="list-style-type: none"> <li>• To provide 'assisted digital support' with using services and carrying out transactions online.</li> <li>• To promote the use of PCs and the role of information in resolving problems.</li> <li>• To provide information about the local Citizens Advice and other advice services to clients from a diverse range of backgrounds and cultures.</li> <li>• To enable clients to develop the skills and confidence they need to use digital technology effectively.</li> </ul>	
<b>MAIN DUTIES &amp; RESPONSIBILITIES</b>	<b>PERSONAL SKILLS &amp; QUALITIES</b>
<ul style="list-style-type: none"> <li>▪ Explaining the service to members of the public.</li> <li>▪ Supporting clients with using self-help services including PCs.</li> <li>▪ Helping clients to identify the correct leaflet, self-help resource or service provider.</li> <li>▪ Identifying when clients need to be referred for more help.</li> <li>▪ Signposting clients appropriately to suit their needs following agreed protocols.</li> <li>▪ Recording client numbers and issues.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Ability to offer help appropriately and sensitively in a public environment.</li> <li>✓ An understanding of why confidentiality is important.</li> <li>✓ Excellent communication skills.</li> <li>✓ Being open and approachable.</li> <li>✓ Respect for views, values and cultures that are different from your own.</li> <li>✓ A commitment to the aims and principles of the Citizens Advice service.</li> <li>✓ A positive attitude to self-development and assessment.</li> <li>✓ Ability to work as part of a team.</li> <li>✓ Ability to recognise the limits and boundaries of the role.</li> </ul>

# Initial Adviser

## PURPOSE OF THE ROLE

To help provide an effective and efficient service to members of the public. This role is done by Face to Face & via telephone.

To help influence government and other organisations by informing them of the effect of their actions on the lives of clients.

## MAIN DUTIES & RESPONSIBILITIES

- Explain the initial advice process;
- Explore the client's problem(s) and situation;
- Assess the urgency of the client's issues and their ability to deal with the problem themselves;
- Identify the next step which needs to be taken;
- Summarise the content of the interview for the client and explain what happens next;
- Help clients to complete basic, fact based forms
- Help clients to complete simple benefit checks
- Contact 3<sup>rd</sup> parties on behalf of clients
- Ensure clients know they can return for further assistance;
- Record the enquiry on the national database.

## PERSONAL SKILLS & QUALITIES

- ✓ Be good at listening;
- ✓ A commitment to the aims and principles of the CA service
- ✓ A commitment to volunteer for two 3 hour or one 6 hour session per week;
- ✓ Have a good manner when talking to people face to face and on the telephone;
- ✓ Be able to work in a team;
- ✓ Have some computer skills, basic word processing skills and be able to navigate the internet. Training on the use of our databases will be given;
- ✓ Be able to read and write English and do basic Maths;
- ✓ Be open-minded and non-judgmental;
- ✓ Enjoy helping people.
- ✓ Be willing to learn



# Full Adviser

## PURPOSE OF THE ROLE

To help provide an effective and efficient advice service to members of the public.  
To help influence government and other organisations by informing them of the effect of their actions on the lives of clients.

## MAIN DUTIES & RESPONSIBILITIES

- Interviewing clients, both face-to-face and on the telephone, letting the client explain their enquiry and helping the client to set priorities.
- Finding, interpreting and communicating the relevant information and exploring options and implications in order that the client can come to a decision.
- Acting, where necessary, on behalf of the client, negotiating, drafting or writing letters or making appropriate referrals.
- Completing clear and accurate case records.
- Recognising the root causes of problems and participating in taking appropriate action.
- Keeping up to date on important issues by attending the appropriate training and by essential reading.
- Attending office meetings.

## PERSONAL SKILLS & QUALITIES

- ✓ A commitment to the aims and principles of the CA service.
- ✓ A regular commitment to volunteer for two six hour sessions per week.
- ✓ Excellent communication skills.
- ✓ Being open and approachable.
- ✓ Ability to communicate clearly both orally and in writing.
- ✓ Ability to sift through information and extract what is relevant.
- ✓ Basic mathematical skills, including percentages.
- ✓ Respect for views, values and cultures that are different to their own.
- ✓ An understanding of why confidentiality is important.
- ✓ Being open to using computers on a regular basis.
- ✓ A positive attitude to self-development and assessment.
- ✓ Ability to work as part of a team.
- ✓ Ability to recognise their own limits and boundaries in the role.



## Form Filling Adviser

### PURPOSE OF THE ROLE

To assist clients with the completion of complex benefit application forms.  
To help influence government and other organisations by informing them of the effect of their actions on the lives of clients.

### MAIN DUTIES & RESPONSIBILITIES

- Interviewing clients, both face-to-face and on the telephone, letting the client explain their enquiry and helping the client to set priorities.
- Finding, interpreting and communicating the relevant information and exploring options and implications in order that the client can come to a decision.
- Helping the client where appropriate to complete benefit application forms.
- Completing clear and accurate case records.
- Keeping up to date on important issues by attending the appropriate training and by essential reading.
- Attending bureau meetings.

### PERSONAL SKILLS & QUALITIES

- ✓ A commitment to the aims and principles of the CAB service.
- ✓ A regular commitment to volunteer for two three hour or one six hour sessions per week on a regular basis.
- ✓ Excellent communication skills.
- ✓ Be able to read and write English
- ✓ Being open and approachable.
- ✓ Ability to communicate clearly both orally and in writing.
- ✓ Ability to sift through information and extract what is relevant.
- ✓ Respect for views, values and cultures that are different to their own.
- ✓ An understanding of why confidentiality is important.
- ✓ Being open to using computers on a regular basis.
- ✓ A positive attitude to self-development and assessment.
- ✓ Ability to work as part of a team.
- ✓ Ability to recognise own limits and boundaries in the role.

## Research and Campaigns Worker

### PURPOSE OF THE ROLE

To co-ordinate, promote and be involved in all research and campaigns activities in the service.

### MAIN DUTIES & RESPONSIBILITIES

- Complete and collate evidence forms that record information about the problems clients experience;
- Identify and raise issues in the bureau and at meetings;
- Conduct research and write reports on local issues.

### PERSONAL SKILLS & QUALITIES

- ✓ A strong sense of justice.
- ✓ Understanding of the importance of research and campaigns work.
- ✓ Understanding of key current social issues, and their potential impact on CA clients.
- ✓ Commitment to the aims and principles of the CA service.
- ✓ Ability to give feedback clearly and sensitively.
- ✓ Good report-writing skills.
- ✓ Ability to analyse complex information.
- ✓ Ability to work constructively with other agencies.
- ✓ Ability and willingness to work as part of a team.
- ✓ Ability to work on own initiative, within given guidelines.
- ✓ Desire to continue learning.
- ✓ Basic IT skills and willingness to learn further IT packages.
- ✓ Good level of written and spoken English