



Volunteer Roles

Role	Expectations
Reception	<ul style="list-style-type: none"> • Operate the reception and provide information. • Welcome clients coming into the bureau contact area. • Explain waiting times and procedures to clients. • Provide information about the CAB and other advice services to clients from a diverse range of backgrounds and cultures. • Work collaboratively with other colleagues involved in the advice work process. • Provide a service that is based on sensitivity and respect for clients. • Acknowledge children and/or any special needs and take appropriate action. • Maintain confidentiality about clients and their contact with the bureau. • Consult the Advice Session Supervisor appropriately. • Work within agreed bureau systems and procedures. • Answer the telephone, refer calls or take messages. • Process client information collected at the reception helpdesk. • Provide client with information where appropriate, including details of other agencies and leaflets/fact sheets from the Citizens Advice website. • Create, maintain and archive paper and electronic filing systems in accordance with the bureau's systems and procedures. • Liaise with advice staff regarding support for individual clients. • Use IT for record keeping.
Admin	<ul style="list-style-type: none"> • Maintain stocks of stationery, leaflets and posters, and order from suppliers. • Maintain online and other electronic appointment diaries. • Update public information materials and information. • Maintain statistics and collate and produce reports to a prescribed format. • Type letters and memos for bureau workers. • Update databases and information systems. • Filing.

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	<ul style="list-style-type: none"> • Photocopying. • Take minutes at workers' meetings. • Answer the telephone, take messages when appropriate. • Order stationery and other necessary items. • Complete research and campaigns forms. • Order and organise leaflets. • Greet clients. • Use IT for record keeping.
Information	<ul style="list-style-type: none"> • Preparation and updating of information packs/toolkits • Ensure posters and materials on display in all services are current and appropriate. • Organise the leaflets available for clients, ensure they are up to date and stocks are held. • Ensure clients are able to find the information they need easily. • Keep up to date on developments in advice work, research and campaigns, and local organisations to ensure that materials are current.
Campaign and Research	<ul style="list-style-type: none"> • Provide support and guidance to advisers on research and campaigns work. • Help advisers identify suitable cases for research and campaigns work. • Complete Bureau Evidence Forms from advisers' Quick Evidence Forms. • Submit completed Bureau Evidence Forms to Citizens Advice. • Monitor trends in bureau enquiries to identify issues for potential local/national research and campaigns work. • Monitor the research and campaigns round up, Citizens Advice and other publications and newsletters. • Network with other people involved in research and campaigns work within Citizens Advice - locally, regionally and nationally. • Run small group sessions for bureau staff on aspects of research and campaigns. • Report to managers on individual and team learning needs in relation to research and campaigns work. • Make proposals for new research and campaigns initiatives. • Produce written reports on any of the above, as required.

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Advisers	<ul style="list-style-type: none"> • Interview clients, both face-to-face and on the telephone, let the client explain their enquiry and help the client to set priorities. • Find, interpret and communicate the relevant information. Explore options and implications in order that the client can come to a decision. • Where necessary to act on behalf of the client - negotiating, drafting or writing letters or making appropriate referrals. • Complete clear and accurate case records. • Recognise the root causes of problems and take the appropriate action. • Stay up to date on important issues by attending the appropriate training and doing essential reading. • Attend bureau meetings.
Triage	<ul style="list-style-type: none"> • Assess clients' problem(s) using sensitive listening and questioning skills. • Identify key information about the problem including time limits, key dates and any requirement for urgent advice or action (using the Citizens Advice website, scripts and any other diagnostic tools as necessary). • Identify and summarise the essence of the problem. • Establish what the client wants. • Assess and agree the appropriate level of service, taking into consideration the client's ability to take the next step themselves, the complexity of the problem and the bureau's resources. • Refer clients appropriately (both internally and externally) to suit clients' needs following agreed protocols, including making arrangements and informing clients of what to expect. • Signpost clients appropriately to suit their needs following agreed protocols. • Provide clients with discrete advice appropriate to their individual needs following agreed protocols. • Record information and any discrete advice given during gateway assessment interviews onto Petra gateway screens.
Adviceline	<ul style="list-style-type: none"> • Assess clients' problem(s) using sensitive listening and questioning skills. • Identify key information about the problem including time limits, key dates and any requirement for urgent advice or action (using the Citizens Advice website, scripts and any other diagnostic tools as necessary).

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Community Engagement	<ul style="list-style-type: none"> • Conduct targeted needs analysis to improve population-specific approaches, facilitating flexible service delivery and enabling us to respond to needs as they emerge. • Design satisfaction surveys for clients. • Design surveys for bureau workers. • Consultations: stakeholders and users • Provide a range of opportunities for feeding back opinions on services • Preparation of reports and statistical information. • Deliver training on debt, benefits, housing, money management skills etc. in an interesting and engaging manner. • Ensure feedback is received from training participants. Review, revise and improve courses/materials in the light of feedback from participants. • Maintain accurate records of training sessions delivered and those receiving training; produce reports as required. • Organise delivery of courses; liaise with partner organisations as and when required. • Create and build networks with local organisations to promote financial capability training opportunities for their service users and members. • Advertise and market group sessions to ensure course attendance is maximised. • Identify research and campaigns issues arising from work with clients. • Make referrals for advice appointments where appropriate. • Attend bureau meetings and other national events where

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	appropriate.

Individuals come to us from all kinds of backgrounds and it is important that a local Citizens Advice fully represents the community that it serves. We are therefore always looking to improve volunteer diversity.