

# An Introduction to Volunteering with Citizens Advice Knowsley

**This booklet is divided into 5 sections:**

- 1. Overview of the Citizens Advice service** **page 2 - 13**
  - Introduction
  - Aims and Principles
  - Structure of the Citizen's Advice Service
  - Valuing difference and providing equal opportunities
  - Campaigns and Research
  - Campaigning
  
- 2. About Citizens Advice Knowsley** **page 14 - 18**
  - Key facts
  - Graphs detailing client problems, new clients, gateway approach
  
- 3. Training and development** **page 19 - 24**
  - Support and supervision
  - Minimum commitment and attendance requirements
  - Resolving problems
  - Attitudes and awareness
  
- 4. Volunteer roles** **page 25 - 30**
  - Citizens Advice volunteering – the facts
  
- 5. Assessment days** **page 31**

## Overview of the Citizens Advice Service \*



The Citizens Advice service provides advice to any member of the public who needs help to solve a problem on any issue they're facing.

The Citizens Advice service has a network of around 300 member Citizens Advice offices and 23,000 volunteers, delivering advice services from over 2,600 outreach centers. We provide advice face-to-face, over the phone and through digital channels. We act as one service, with one vision, yet we are also rooted in each and every community across England and Wales.

In 2016/17 our network saw 2.7 million people with 6.3 million issues.

Our 2014 national research into the outcomes and impact of our advice demonstrated that at least two out of three clients who seek our help will have their problem partly or completely solved.

From 2012, we have had responsibility for the Consumer Direct telephone service, now known as the [Citizens Advice consumer service](#)

On 1 April 2015, Citizens Advice took over responsibility for the Witness Service from Victim Support. Nearly 300 staff and 2,500 volunteers join Citizens Advice to continue to offer free support for witnesses in over 300 criminal courts across England and Wales.

## Introduction

Welcome and thank you for your enquiry about volunteering with the Citizens Advice service.

The information in this booklet is intended to give you a general overview of what you can expect from volunteering with Citizens Advice. More detailed information about the office you will be volunteering in will be provided during your induction.

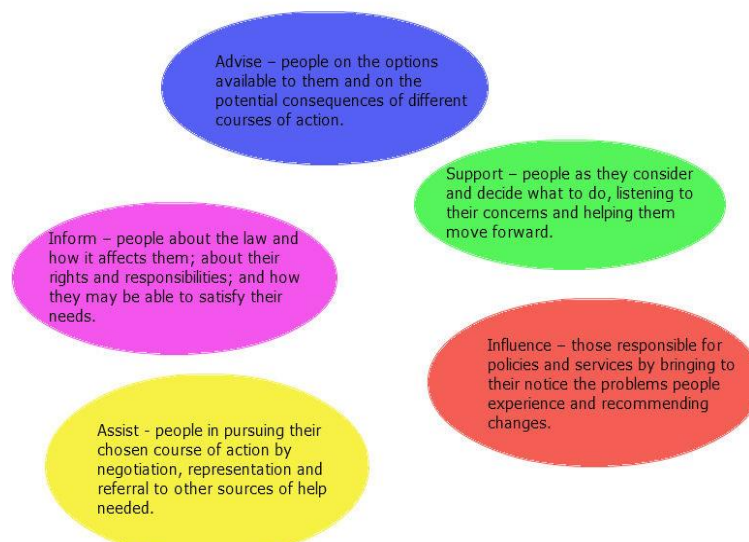
As a volunteer at your local Citizens Advice, you will be joining a national service providing free and independent advice and dealing with 6.6 million enquiries a year. Although the Citizens Advice service is the world's largest independent advice giving agency, its roots and strengths lie with the contributions of local volunteers in their local communities. Thank you for volunteering to play a part in delivering this important and valued service.

The Citizens Advice service provides free, confidential and impartial information and advice on a wide range of subjects and aims to make this available to all, regardless of race, gender, disability, age or sexuality. It draws on its experience of client problems to suggest where improvements can be made to local and national policy. It is committed to equal opportunities for clients and for all the people working in Citizens Advice, whether paid or voluntary.

The majority of people involved in the Citizens Advice service give their time on a voluntary basis: volunteer advisers, gateway assessors, trustee board members, administrators, receptionists, Campaigns and Research co-ordinators and many more enable us to provide a service from over 3,300 outlets. This represents a huge commitment from individuals and local communities to providing information and advice to the public.

### The Citizens Advice service works to:

Our aim is to make you feel welcome and to encourage you to ask questions. Thank you for volunteering and we hope that you find being part of the Citizens Advice service interesting and rewarding.



## **Aims and principles**

The Citizens Advice service has two aims of equal importance.

The service aims:

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives.

In other words, we give advice, information and assistance directly to those people who come to us for help. We can make a difference to these peoples' lives by helping them to manage their problems more effectively.

We use the experience of our clients' problems to tackle the underlying causes of those problems. Information collected within each office, each area and nationally gives the Citizens Advice service a clear idea of where social policies and services are failing. We can use this evidence to draw government attention to particular recurring problems. In this way we can prevent similar problems arising for others, and so make a positive difference to the lives of thousands of people who may never be in contact with us.

The Citizens Advice service is based on four principles. It is:

**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 anything on a client tells us – or even the fact they have visited us, without their permission

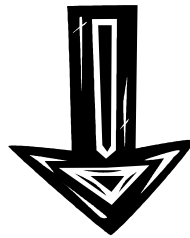
**Free** – No-one has to pay for any part of the service we provide

**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.**

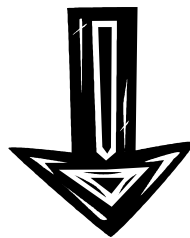
**The contribution of all volunteers in all roles is essential to helping us achieve this.**

## National and area structure of the Citizens Advice service

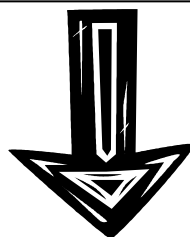
The Citizens Advice service is an independent organisation, founded in 1939. It responds to almost 6.6 million enquiries every year. It draws on its experience of clients' problems to suggest where improvements can be made to the social policy and services of national and local government.



We give advice from over 3,300 different outlets in England and Wales. All belong to the Citizens Advice service, which sets standards for advice, training, governance, equal opportunities and accessibility. National Citizens Advice coordinates national social policy work, which is based on the evidence collected from outlets around the country. The organisation coordinates national and regional media, publicity and parliamentary work.



Each member organisation is an independent charity, responsible for running its own affairs within the agreed policies and standards of the Citizens Advice service. As a member of the service, it is entitled to the services and support provided by national Citizens Advice and to vote in the Citizens Advice service AGM. It is the Members of the National Association (Citizens Advice) who ultimately decide on Citizens Advice policy.



Citizens Advice Knowsley covers the whole of the Borough of Knowsley and has service delivery outlets at Kirkby and Huyton as well as at a range of outreach locations. Staff in these outlets work closely to develop services to clients and to ensure standards are maintained and policies followed.

## Valuing difference and providing equal opportunities

The Citizens Advice service is committed to equal opportunities for all. Everyone involved in the service must commit themselves to Citizens Advice's equality and diversity policy. This includes the commitment to taking action to achieve the effective implementation of the policy. Our equality and diversity policy aims to ensure that those facing discrimination feel welcome within Citizens Advice and feel able to use its services.

The Citizens Advice service seeks to eliminate all forms of discrimination. We welcome volunteers from all walks of life, and want our volunteer teams to reflect the make-up of the communities we serve. We think this is important because:

- We live in diverse communities, and this diversity should be recognised and valued.
- The skills, experience and satisfaction that can be gained through volunteering should be available to everyone.
- Involving a wide range of volunteers will help us to more fully understand and meet the diverse needs of our clients and of those who do not currently use the service. This will improve our service delivery and the quality of our advice.
- We want our service to be available to everyone that needs it and people will be more likely to use the service if they can relate to the people providing it. It will make Citizens Advice seem more relevant to a wider range of people.
- If Citizens Advice is supported by, involves and provides a service to a wide range of people, it will have more credibility as an organisation representing the interests of the community. This will make it more effective in partnership work and in influencing policy change.
- A wide range of volunteers will lead to a wide range of opinions, priorities and perspectives, which will keep the Citizens Advice service in touch with grassroots concerns and keep its demographic structure healthy.

The service requires all paid staff, trustee board members, volunteers, visitors and clients to behave in a positive manner, to support, implement and develop practices and procedures that promote and reinforce equality of opportunities and treatment for all. All members and affiliate organisations or their representatives are expected to concur with and actively promote equality and diversity policy.

There are four self-organised equal opportunities groups within the service:

- Disabled People Creating Change
- National Lesbian, Gay and Bisexual Group
- National Black Workers Group

- National Women’s Group

They can offer support to staff and volunteers facing discrimination, and lead and inform debate and policy development on equal opportunities issues within Citizens Advice. Details of all of the groups are available on Cablink (Citizens Advice intranet), the staff notice board or from your supervisor.



## Stand up for Equality

The overall aim of the Stand up for Equality strategy is for the Citizens Advice service to live our principles and challenge discrimination, promote equality and value diversity.

To deliver this aim we need to achieve culture change on two levels – in society and in the service. To drive that change we will focus on priorities: three target areas of change, with progress in each helping to generate further change.

This is shown in picture form on the next page.

Culture change:

- Fully live our aims and principles
- Provide the equality advice and advocacy people need

## **Target areas**

The target areas are:

### **One: Challenge discrimination through advice by:**

- Identifying discrimination and human rights issues.
- Providing the equality advice people need.
- Empowering clients to act.

### **Two: Promote equality through advocacy by:**

- Telling our diverse clients' stories.
- Ensuring those in authority do their job.
- Leading on and influencing key policy on equality.

### **Three: Value diversity through our roles of employer, volunteer agency and contractor by:**

- Providing visible and committed leadership.
- Developing a strategic approach to diversity management.
- Implementing equality competences.





## Campaigns and Research

When a client contacts Citizens Advice, the root cause of their problem is often an unfair policy, practice or piece of legislation. We are required to campaign against unfair policies of government, service providers and other bodies. Tackling problems at source helps everyone, whether they have sought advice or not, and frees up resources.

Citizens Advice has influence because our Campaigns and Research work is rooted in the experiences of real people, supplied by our workers. Policy influence takes place at local, regional and national levels, either as a result of major national campaigns or discreet pieces of local work. We involve our clients for maximum effect and all staff have a role.

### Campaigns and Research Evidence Cycle



### What is Campaigns and Research work?

All of us are affected by rules and principles which shape the services and benefits that we all rely on.

These rules and principles are evident in legislation, regulations, codes of practice, other administrative guidelines and the policies of service providers. However, they are not always written down or otherwise made explicit. This is often the case in the delivery or administration of services.

Some policies affecting Citizens Advice clients are national, such as social security, employment and immigration. Others are national but administered according to local

policies and practices such as housing benefit, community care, housing, health and education.

One of the aims of the service is 'to improve the policies and practices that affect people's lives' and this is what is known as 'Campaigns and Research work'.

### **Why do Campaigns and Research work?**

Whilst advice may benefit an individual client, it is more effective in the long run to tackle the root cause of a problem and persuade the policy maker to make a change.

For example, long delays in processing housing benefit locally will increase client numbers. If we are able to help the housing benefit department understand the impact of delays, identify the problems and find solutions, many people will benefit:

- Existing clients will benefit from reduced delays.
- People who have not even heard of Citizens Advice will benefit too; this is a way of reaching the whole community.
- Our staff will benefit by having fewer housing benefit delay problems to deal with, allowing us to concentrate on other areas.
- The local authority will benefit by having fewer complaints and an improved service.
- We have taken practical steps to tackle discrimination and inequality.

All of the above will enhance the reputation of the service in the local community. This could well lead to improved funding prospects and greater success in the recruitment of volunteers.

## Campaigning

The stories that clients share with us in Citizens Advice give us a unique and fresh insight into the problems faced by people living in the UK.

With over 2 million clients each year, it's the kind of evidence that's hard to ignore; it becomes all too apparent when policies and services cause people issues.

We see it as our responsibility to create a public debate around these issues and speak up for our clients. You can support our campaigns to change things for the better.

We undertake quantitative analysis of the 7 million or so problems recorded in our client database each year. We also undertake qualitative analysis of the 50,000 problems that our staff draw our attention to specifically. **Then we act.** We raise the issues with those who are causing them and suggest how they could be avoided.

As well as giving a voice to our clients, our policy work ensures new policies are based on evidence rather than assumptions, benefitting many more people than we could ever advise one-to-one.



### PAYDAY LOANS

We called for:

- **enforced, effective regulation** for all payday lenders.
- removal of **irresponsible advertising**.
- levies paid by payday lenders to the Financial Conduct Authority to mean an **increase in funding for debt advice**.

### UNIVERSAL CREDIT



- Ensure all working families on universal credit receive at least 85 per cent towards the costs of childcare so that work **always** pays.
- Fund local Citizens Advice services to deliver effective support for people moving onto universal credit.
- Allow people the right to decide whether they want their benefits paid more frequently than monthly.
- Allow people the right to decide if they want their housing costs paid directly to their landlord.
- Ensure that everyone has access to at least a basic bank account



## WORKING WITH PARLIAMENT

We work closely with parliamentarians and assembly members to provide information about the problems that affect our clients.

We prepare briefings for debates and provide parliamentarians with regular updates on our policy work. Our latest [parliamentary briefings](#) are available online.

We also have the All Party Parliamentary Group (APPG) on Citizens Advice. This gives parliamentarians an opportunity to express their support for the Citizens Advice service and to stay up to date with policy developments which impact upon our service and our clients.

There are over seventy members of the APPG on Citizens Advice, with members from across the political spectrum and from both Houses of Parliament.

In a recent meeting we presented a new tool that allows MPs to view [Citizens Advice data by constituency](#).

## **About Citizens Advice Knowsley Services**

**Our vision for Knowsley: A borough where no resident suffers disadvantage as a result of an inability to access the advice he or she needs.**

We will achieve this by:

- Providing the advice people need for the problems they face
- Improving the policies and practices that affect people's lives.

Our principles

- We will deliver a service that is free, independent, confidential and accessible to all those who live, work or study in Knowsley.

Our Services:

Citizens Advice Knowsley currently comprises two main offices, an Adviceline, and a website. We provide services using 24 paid staff and approximately 40 volunteers.

- Kirkby open 5 days a week at 1<sup>st</sup> Floor 2 Newtown Gardens, Kirkby L32 RR
- Huyton open 5 days a week at Nutgrove Villa, 1Griffith's Road Huyton L36 6NA
- Halewood open 2 days a week Monday and Wednesday at Halewood Centre, Rose Heath Drive, Halewood L26 9UH

We are currently operating an outreach at the following Knowsley location:

- Stockbridge drop in service Tuesday 10:00am – 12:00pm at Villages Housing Association, 16 The Croft, Knowsley, L28 1 NR

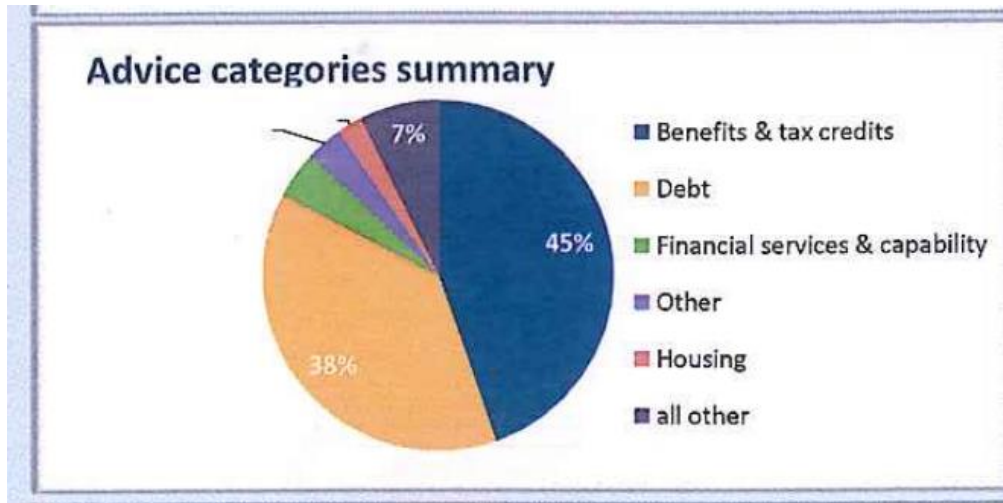
Citizens Advice Knowsley Adviceline: 0344 826 9694 Monday - Friday 10.00am – 4.00pm

Citizens Advice Knowsley online contact form: [www.citizensadviceknowsley.org.uk](http://www.citizensadviceknowsley.org.uk)

Email: [advice@citizensadviceknowsley.org.uk](mailto:advice@citizensadviceknowsley.org.uk)

## Client problems in Knowsley - April 2016 – March 2017

### The proportion of issues by type



To increase access to good quality legal advice specifically in the areas of welfare benefits, debt, housing and employment, for those in greatest need who live work or study in the Borough of Knowsley so they can avoid or overcome disadvantage by:

- improving the way in which existing local advice providers from the voluntary, public and private sector work together in partnership
- improving the quality of advice within those advice providers
- helping more people to receive the advice they need at an earlier stage by making more efficient use of current resources and making it easier to find, and
- identifying and then preventing commonly encountered legal problems

Citizens Advice Knowsley work with the following organisations:-

- The Money Advice Service
- Enterprise Hub
- Better Off Finance
- Greater Merseyside Money Advice Project (GMMAP)
- Advice Services Knowsley (ASK)
- Pensionwise
- Advice Skills Academy

The key project activities undertaken to achieve the overall aim are twofold:

- The setting up of a adviceline which offers callers a single point of access to all the advice providers within Knowsley

- The provision of high quality training and quality assurance



## Gateway Assessment through the Advice line

### How we deliver our service – Gateway to advice

A client who comes into one of our offices or who calls the Advice line will be required to have a gateway assessment: a short diagnostic interview which enables the gateway assessor to determine the client’s problem and to decide what is the next best option for them, taking into account the client’s level of understanding of their problem, the urgency of the problem and the impact to the client if nothing was done to help them. The gateway assessor has up to 6 “next step” options to choose from as to how best help the client and their problem, see the list of options below.

### Overview of the gateway approach

- Ensures that **information** is available for those who are able to use it to resolve their own problems.
- Undertakes a time limited **assessment** of the client’s presenting problem in order that next steps can be identified.
- Enables the **next steps** to be taken.

### Next Steps

#### Assisted Information

In some cases it may be appropriate to give the client quality assured information which they can act on themselves (self-help). In other cases it will be necessary for the information to be identified – this is known as “assisted information”. The gateway assessor will have to assess the client’s ability to understand and use the information e.g. the client’s ability to read and write English.

#### Telephone Call-Back

In this case the client will receive a pre-arranged telephone call from a Citizens Advice adviser to further explore the client’s situation and to give appropriate information, advice and assistance.

#### Generalist Adviser Appointment

In this case the situation will need to be explored in depth. There may be paperwork to look at e.g. a contract of employment or the client may need extra support because of a disability or because English is not their first language. The adviser may contact third parties on the client’s behalf by telephone or in writing. In addition, further follow-up appointments may be needed to progress the client’s case.

#### Specialist Adviser Appointment



If the client's issue is complex it may need an adviser who is a specialist in a particular area, e.g. an employment issue that involves an application to the Employment Tribunal. The specialist will have expertise in the full range of casework which may involve advising on legal rights, preparing documents and assisting with court procedures. However, this may not include representation at courts or tribunals.

### Signposting

The gateway interviewer can identify those clients who can best be helped by other organisations and direct them accordingly. There are a number of national and local service providers that clients can safely be signposted or directed to providing they meet the appropriate criteria. Unlike a referral (see below) signposting does not involve us in contacting the other organisation.

### Referral to another service provider

A referral takes place when key information about the client and their case is passed on to another service provider and it is agreed that it will provide further help. The referral may be done according to a pre-arranged procedure as in our Advice Service Knowsley Project where referrals are made to our partner organisations. Additionally, referrals may be made to other specialist organisations on a case by case basis.

Citizens Advice Knowsley will have a receptionist on hand to help organise clients as they come into one of our offices. After they have registered with the Receptionist, they will be given an interview with a gateway assessor. At the Adviceline, all calls go straight through to a gateway assessor.

## CASE STUDIES

### Case study 1

A client came in asking for help as she was claiming Disability Living Allowance (DLA) and when she was required to transfer onto PIP she failed the PIP assessment after being awarded 0 points.

Our benefits advisor assisted her with appealing this decision and our client won the appeal.

Not only did our client win the appeal, but on DLA she was receiving middle rate care and low rate disability, and she has now been awarded the enhanced rate daily living component and enhanced rate mobility component. This means that she will see an increase in the amount she receives compared to when she was receiving DLA.

In total, the award will run for at least 5 years, and in this time she will receive £36,335 in PIP entitlement and an additional severe disability premium of £17,186 added to her ESA entitlement.

This means our client will be £53,521 better off across the next 5 years!

### Case study 2

At this time of the year, as we move into the cold, dark nights, a faulty boiler can be a major problem for those people who cannot afford replacement or repairs.

This week we were delighted to be able to help one of our clients in our Kirkby branch with a condemned boiler. Our adviser Danny provided advice to a client who was in financial hardship unable to replace or repair their boiler based on their limited income.

Danny was able to find a solution by identifying the client's eligibility for a charitable grant towards the cost of a new boiler and helped the client with the application. The stressed out and vulnerable client was successfully awarded £2,490.60 towards the cost of a new boiler upon meeting the criteria, making sure that they are kept warm and safe this winter.

Yet more evidence of the value and importance of the CAB service when you have a problem.

## **Training and development**

All of our volunteers have an induction. There are learning programmes for a range of roles, with minimum commitment requirements attached to each volunteering role. The training programmes provided to all our volunteers take up a significant amount of our resources and therefore we select all our volunteers carefully to ensure they can adhere to these minimum commitment requirements as the provision of a high quality service to our clients is our main priority.

Your training and personal development as a volunteer is very important to us, in order to both:

- enable you to get the most out of volunteering
- give you the skills and knowledge you need to provide a high quality service.

Volunteer assessors / advisers need to reach a certain level of ability before they can interview or interact with clients. This is to ensure that the service to clients meets specific standards.

Citizens Advice learning programmes are designed to train people without any previous experience of this kind of work.

All volunteers have opportunities for ongoing training and development throughout their time with us. This may be further training in your existing role or developing for a new role.

## **Support and supervision**

Volunteer support is provided in a number of ways in the Citizens Advice service. All volunteers will have a member of staff to support and supervise them. This support will be available whenever you are with us and will aim to ensure that:

- you feel good about what you are doing
- you do not feel isolated or left “in at the deep end”
- problems can be resolved
- there is a focus on you both as an individual and as part of a team
- you have adequate support and supervision on a day-to-day basis

Staff and volunteers all provide each other with support on an informal basis. The knowledge, experience and familiarity with the service of longstanding volunteers, combined with the enthusiasm and bonds formed in a group of trainees creates an invaluable support network.

In order to help you make the best use of your time and help us deliver the best possible service to clients, you will be given structured opportunities for feedback and to discuss your progress. These support sessions will be focused on personal development and how you are helping clients by:

- talking about progress to date and any current training needs
- making sure that you are clear about what your role involves
- exploring how you can improve your performance, and so help the service provide a better service to its clients
- making sure that you find what you are doing interesting and satisfying, and offering opportunities to learn new skills and develop your role
- Making sure you are happy with your involvement with Citizens Advice Knowsley and the support you receive, and exploring any ways that these could be improved.
- identifying training needs and discussing and agreeing on action that needs to be taken to ensure that you can carry out your role effectively.

### **On the job training**

Citizens Advice Knowsley ensures that all volunteers who meet our selection criteria receive sufficient high quality training and support to develop and maintain competence in their role.

In April 2010 Citizen's Advice launched their new modular training framework for all roles within the service whereby those volunteers who have successfully completed their training in a particular role, for example, receptionist or gateway assessor roles, can progress onto the more challenging role of being an Adviser.

The training programmes are still based on the concept of acquisition of competences – the mix of skills, knowledge and attitudes that are required of a Citizens Advice Adviser, Gateway Assessor or Receptionist. These competences have been developed within and endorsed by the service, to meet the particular needs of our membership scheme with Citizen's Advice.

However, our general approach to training is focused on ensuring that our volunteers learn best through properly supported learning that is based on structured experience; all our volunteers in whatever role learn "on-the-job", i.e. carrying their work out face-to-face with clients or at the Adviceline under the supervision of the Supervising Advisers. This structured on-the-job training allows the volunteer to experience working with clients first hand, but under close supervision, so that the quality of our service is never compromised.

Time spent with clients allows volunteers to learn from the properly supervised experience and thereafter they are able to discuss the same with their Training Supervisor at regular reviews. E-learning is a big part of the new modular training programme, a vast array of information is available on the Cablink training website and volunteers are encouraged to explore the training and learning available to them to understand and to develop in their roles. The new approach has proved most beneficial in allowing trainees to use and learn skills whilst interacting with clients and finding relevant information much sooner in the process.

## Minimum Commitment and Attendance Requirements

The training opportunities offered by Citizens Advice Knowsley consume significant resources and therefore we have to insist that volunteers must be able to adhere and commit to the training timetables and be available to attend at our offices or the Adviceline at times decided by the Training and Service Management Teams. We can be flexible to a certain degree but our priority is to deliver an advice service to our clients.

### **Adviser: 1-2 days per week**

Training takes place within our offices where the volunteer is expected to attend observation and induction sessions. The training is in 4 stages Induction, Shadowing, Supported interviewing and solo practice.

You'll be introduced to the advice subject areas and practical advice skills by working through training materials and taught sessions, and by shadowing experienced advisers. In addition Citizens Advice run specialised courses which your Training Supervisor will book you a place.

### **Adviceline 1-2 days per week**

Training takes place within our offices where the volunteer is expected to attend observation and induction sessions. Most volunteers will start to assist clients within 4-6 weeks of starting their training.

### **Receptionist: 1 day per week, 9.00am to 3.00pm**

Training takes place within our offices where the volunteer is expected to attend observation and induction sessions. Most volunteers will start to assist clients within 2 weeks of starting their training.

### **Benefit Form Filler 1-2 days per week**

Training takes place within our offices where the volunteer is expected to attend observation and induction sessions. Most volunteers will start to assist clients within 4-6 weeks of starting their training.

### **Gateway assessor / Initial checker 1-2 days per week**

Training takes place within our offices where the volunteer is expected to attend observation and induction sessions. Most volunteers will start to assist clients within 4-6 weeks of starting their training.

### **Other roles**

Requirements for other roles will be set out by the responsible manager/supervisor.

## Resolving problems

Citizens Advice Knowsley aims to treat all volunteers fairly and consistently. We hope you will always feel able to share your ideas, views and any other concerns you have. We need to know when things are going well and if they go wrong.

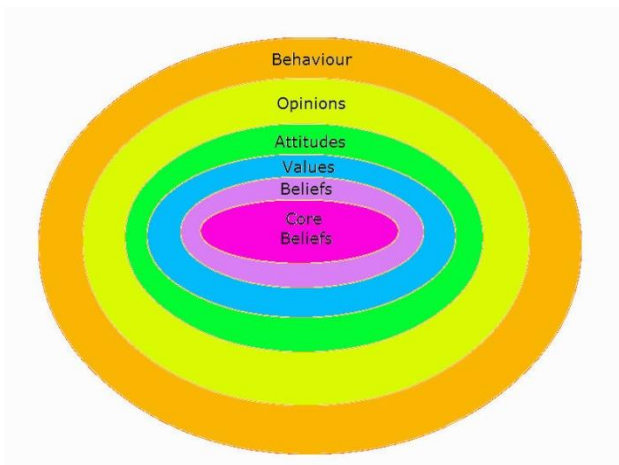
If you have a complaint, or you are worried or upset by something that is happening, you should talk to your Training Supervisor. S/he will make sure that your views are heard and that the problem is resolved as quickly and with as little fuss as possible. This may involve the supervisor meeting with anyone else concerned. If you need to progress the matter further a complete procedure is available as detailed in our Volunteer Handbook which is available to all volunteers when they join.

We will provide you with training, support and clear guidelines as to what will be expected of you as a volunteer, to be in attendance for training and most importantly the carrying out of your volunteer role in our service. If the supervisor / manager feels that a volunteer's behaviour is harmful to the interests of the service or its clients, s/he will discuss the problem with the volunteer and, if necessary with anyone else involved. S/he will clarify what is expected of a volunteer and the reasons for this. A period of increased supervision or training may be requested.

In order to provide a consistent high quality service, volunteers in any role must reach a certain level of competence. If a volunteer adviser does not reach or keep up this level, the service may be able to provide them with additional support or training, or ask them to change roles.

**We must put our clients' interests first. Very occasionally, we may have to ask volunteers not to continue volunteering.**

## Impartiality and being Non-judgemental: Attitudes and Awareness



### Opinions

Many people joining the Citizens Advice come across clients, problems and ideas they have never considered before. Many of their opinions are challenged just by their experience of working with clients within our service. This is the most powerful experience a volunteer can have because it is direct and personal to them.

### **Attitudes and values**

The difference between attitudes and values is difficult to unravel. Values tend to be more deep-seated than attitudes, but both are rooted in upbringing and underlie opinion and behaviour. Attitudes and values are often unconscious until something challenges or questions them. Again this may happen in response to working with clients.

### **Beliefs**

In this model the next deepest level is beliefs. Beliefs often provide a strong framework, or a more coherent set of values within which people live and which guides their attitudes and behaviour. Examples of strong sets of beliefs are religious and political beliefs. Questioning these beliefs is very difficult and usually leads to a defensive response, which closes down opportunities for learning.

### **Core beliefs**

These are the core psychological beliefs that people hold at an unconscious and very powerful level. An example is "I am a worthwhile person". To attack this is to provoke a very strong defence. Poor challenging which attacks the person can lead to that person, and even the whole group, becoming defensive. This is counterproductive when we want people to learn.

### **What we can achieve through a training programme:**

- Exploration and explanation of the expected standards of behaviour.
- New information to consider.
- Some reconsideration of opinions and assumptions.
- Acceptance of/demonstration of the possible effect of unconscious attitudes on the service to clients.
- The development of self-awareness and exploration of attitudes.
- The start of reconsideration of some attitudes.
- In designing training programmes we include exercises that address behaviour and opinions and move people into awareness of attitudes. We are aiming for programmes that encourage participants to be open to learning, challenge and change and that keep the service to the client as the over-riding focus and purpose.

### **The process of stereotyping**

We start out on the premise that everyone stereotypes – it is part of the human condition. We make instant judgements based on dress, the name, the accent and what people look like.

Consciously, we know that these instant views are often wrong, but we still do it! We are often 'caught out' by incongruities:

- The scruffy young man who, when he speaks, has a cut glass accent.
- The young Asian girls dressed in Salwar Kameez who speak with a broad Yorkshire accent

- The smartly dressed man who has a consumer problem about a pair of shoes and when the adviser says he could send them away for testing finds out that they are his only pair of shoes.

The challenge for Citizens Advice volunteers is that we meet all sorts of people as clients and we have to create a rapport quite quickly. Our instant judgements are a part of this process. The obvious danger is when our stereotype is strongly positive or negative. As volunteers working within our service, we have to keep our instant judgements in check and allow ourselves to truly listen to what the client is saying. The training in this area that we provide falls into three main categories.

- 1. Understanding where our attitudes and assumptions come from.**  
Some training aims to develop an understanding of the processes whereby we develop a set of views of the world and people in particular. This can help create an awareness of the way we think and therefore we will be less likely to fall in to the trap of making incorrect assumptions.
- 2. Awareness of our own views and assumptions.**  
This training helps us look at our own cultural and personal assumptions, looking at particular assumptions we can make, say about people in debt. We will also be using a number of thought provoking exercises, some in the form of 'games' which are best done in a group.
- 3. How you can keep your views in check when working with clients.**  
Various sections of the training site have learning materials on how we should handle our own attitudes and assumptions.



## **Volunteer Roles**

### **Receptionist**

- Greet clients and other visitors
- Ensure clients know what is happening and how long they have to wait.
- Explain the services available.
- Point out and hand out leaflets, lists and self-help materials.
- Monitor client numbers and waiting times.
- Maintain the reception area.
- Enter information into computer systems.
- Specific qualifications and experience are not required to take on the reception role.
- Have a good manner when talking to people.
- Have basic computer skills.
- An understanding of, and commitment to, confidentiality.
- Be friendly and approachable.

### **Information Assistant**

- Plays a key role in helping clients to find the information they need and / or to use the different facilities, kiosks, online computers, benefits calculators, direct-dial phones, etc.
- Helps provide the correct leaflet, self-help resource or service provider.
- Identifies where a gateway assessment may be required.

### **Gateway Assessor**

- Gateway assessors carry out an initial assessment to decide the best next steps for the clients – do they need:
  1. Information
  2. An advice interview, or
  3. Can another agency help them better?
- Gateway assessments are diagnostic.
- Gateway assessors use a range of information resources.

### **Key skills:**

- Understand and comply with the aims and principles of Citizens Advice and its equal opportunities policies.
- Interview clients in a short, time-limited interview to obtain relevant facts.
- Listen to the client showing empathy and being non-judgemental.
- Identify clients who may be vulnerable and offer appropriate support and assistance.
- Have comprehensive knowledge of the services available to the client from the Citizens Advice Knowsley and its partners.
- Clearly, calmly and effectively give the client details of the service that is being offered.

- Be able to work under pressure in a methodical way, using checklists to obtain enough information to decide on appropriate next steps.
- Have an overview of different enquiry areas so that a comprehensive service is ensured and all subjects are covered.

## **Volunteer 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 and responsibilities may include:**

- 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 staff and volunteer meetings.

### **Personal skills and qualities that an Adviser needs:**

- A commitment to the aims and principles of the Citizens Advice service
- 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
- Average mathematical skills
- Respect for views, values and cultures that are different to their own
- An understanding of why confidentiality is important
- Being open to using digital equipment 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.
- Managing expectations of the client

### **Other roles**

- Social Media
- Campaigns and Research Co-ordinators
- Benefit Form Fillers
- Project Assistants

## **Citizens Advice Volunteering – the facts**

- There are over 21,000 volunteers in the Citizens Advice service and we could not provide our services without them.
- The majority of our advisers are trained volunteers. Training is free and support is provided every step of the way.
- Every Citizens Advice member organisation has a trustee board of volunteer trustees responsible for the management of the service.
- Citizens Advice volunteers also give their time as administrators, receptionists, providing IT support, marketing, interpreting, PR or fundraising skills.
- Over one third of the volunteers who leave the service go on to full time education or employment.
- We need around 5,000 new volunteers every year to continue to meet the needs of local communities.
- The Citizens Advice certificate in generalist advice work is equivalent to NVQ level 3
- Citizens Advice volunteers get free training, ongoing support and expenses paid.
- It takes 250 hours of learning to become a fully competent Citizens Advice generalist adviser.

## **Citizens Advice Volunteering – Frequently Asked Questions**

### **Will I have to complete an application form / have an interview?**

The application form and interview is a two-way process. It enables us to find out more about you, to ensure you are suitable for the role, but also to make sure the volunteering opportunity meets your needs and interests.

If you want to train as an adviser or gateway assessor there may be a slight delay before we are able to take on new trainees to ensure you receive the highest quality of resources, time, support and personal attention.

### **I've got specific skills and experience, can you use them?**

One of the strengths of the Citizens Advice service is the diverse range of backgrounds, skills and experiences our volunteers bring to their roles. We have over 22,000 volunteers in the Citizens Advice service providing a variety of roles.

Naturally, different local services have different opportunities available, according to their needs. We will be able to tell you more about specific opportunities here at Knowsley.

### **Are there certain skills I need to be a volunteer?**

It will depend on which role you are interested in. All Advisers and Gateway Assessors receive comprehensive free training. However, you will need to be open minded, non-judgemental, be able to listen, be supervised and guided, learn and work in a team.

### **What will I get out of volunteering with Citizens Advice Knowsley?**

All of our volunteers find their involvement with us rewarding, satisfying and challenging, and they all get something different from their volunteering.

- Make a difference
- Change things for the better
- Receive accredited training
- Get invaluable work experience and enhance your employability
- Develop new and existing skills
- Put your existing skills and experience to good use to help others.
- Get involved with the community
- Make new friends

### **Do you provide training?**

All Advisers and Gateway Assessors receive comprehensive free training, which is recognised and respected throughout the country.

The training programme consists of observation, working through self- study packs and attendance at training courses run by Citizens Advice head office. You will be supported throughout your training by a Training Supervisor and Advice Session Supervisors. Most offices have several trainees at any one time, so you are likely to be training with other new volunteers.

### **When / what times can I volunteer?**

Services tend to be open during office hours. If you are working full time or studying and are therefore never available during the day it is unlikely you will be able to train as an adviser. Some roles allow you to volunteer from home for part of the time, e.g. trustee, fundraiser, PR officer. You will need to discuss the details with your local office.

### **What are the chances of getting a job afterwards?**

Nearly one third of volunteers who leave us go on to paid employment. Citizens Advice volunteering provides invaluable skills and experience for employment and the experience is recognised by employers. Many of our paid managers, case workers, administrators and other paid staff started out as volunteers.

### **What are the age restrictions on Citizens Advice volunteering?**

Citizens Advice volunteers need to be 18 or over to volunteer within Citizens Advice Knowsley. There is no upper age limit for volunteers.

### **Will volunteering for Citizens Advice affect my benefits?**

If you are receiving certain state benefits you might have a responsibility to inform the relevant agency before you start volunteering.

Volunteering with Citizens Advice will not affect Jobseekers Allowance (JSA) or Universal Credit (UC) providing you:

- Take reasonable steps to find a job (e.g. answering advertisements, signing up with an agency, and taking other steps required by the job centre.)
- Can be available for work for 40 hours each week.
- Inform the benefits office that you are volunteering
- Can take up work or attend an interview within 48 hours.  
We can help you by providing a standard letter stating that you:
- Don't get paid, only reimbursed actual out of pocket expenses.
- Can be contacted at the office while volunteering if a job opportunity becomes available.
- Can be available at a certain period of notice to start work or attend an interview (must be less than 48 hours)

Volunteers receiving Income Support due to unemployment follow the same rules as JSA/UC.

You should notify the relevant agency before starting with us if you receive Incapacity Benefit, Severe Disablement Allowance, Employment and Support Allowance, Carers Allowance, Industrial Injuries Disablement Benefit or Invalid Care Allowance.

We can help by providing a letter confirming the number of hours, that these hours are unpaid and that volunteering is far more flexible and cannot be regarded as the same as paid work.

There are some benefits that are not affected by volunteering and where the relevant agencies do not need to be informed that the person is volunteering. These include: State Retirement Pension, Pension Credit, Council Tax Benefit, Housing Benefit, Statutory Maternity pay, Maternity Allowance, War Widow's Pension and Widow's Pension.

## **Induction Process**

These are held on a variety of days and times.

All volunteers regardless of the role you have volunteered for will be required to take part in the induction process. You'll first learn about the aims and principles of the Citizens Advice Service, the work of the bureau, equalities and diversity, interview skills, and how to use the Citizens Advice information system.

There are minimum attendance requirements for each volunteering opportunity and these can be found on your application form and on page 21 of this booklet.

### **Format for the Induction process**

Induction can be held at either Kirkby or Huyton site. You may be required to attend at a site you have not chosen to volunteer at.

At the end of the induction process you will be expected to:

- Describe the Aims, Principles and key policies of Citizens Advice
- Describe the nature of the work we at Citizens Advice Knowsley carry out
- Explain the Gateway Assessment approach to service delivery
- Explain the key roles underpinning our service delivery
- Consider what it means to be impartial and non-judgemental when volunteering with our service

After induction you will take up your role at your chosen site where you will continue with your training with the support of the Training Supervisor and the Advice Session Supervisor.