



Volunteer Adviser Information Pack

Role details

- Title:** Volunteer Adviser
- Reporting to:** Advice Services Manager (named person assigned)
- Location:** Our service is delivered from various locations across the city, including 4 Citizens Advice Edinburgh Bureau (Dundas St, Leith, Muirhouse, Portobello)
- Shift Pattern:** Shift Pattern: 1. On-site in premises: 9am to 1pm (AM Shift) or 1pm to 5pm (PM Shift), Monday to Friday; or
2. Remote work available to accommodate specific needs or tasks outside of these hours and days.
- Commitment:** Volunteers must provide a minimum commitment of **8 hours per week** for at least 12 months post training.
- Volunteers are also required to undertake a **minimum of 35 hours** dedicated to CPD per year, which includes online training, direct teaching, team meetings, briefing sessions, conferences and supervision.
- Please note:** During the initial training programme, volunteers will be required to undertake online training. This will require home study **in addition** to your regular volunteer shifts.
- Expenses:** Public transport travel can be reimbursed (receipts required).

Our Purpose:

Citizens Advice Edinburgh exists to serve its community and meet their need for information and advice.

We provide free, independent, confidential, and impartial advice to anyone who needs it in our community. Our aim is to make sure that no one suffers through a lack of knowledge or information about their rights and to challenge discrimination and inequality.

Common areas of advice include Employment, Welfare Rights, Money and Debt, Housing, Immigration, Health, and Consumer.

Our twin aims are:

1. To ensure that individuals do not suffer through a lack of knowledge of their rights and responsibilities, or of the services available to them, or through an inability to express their need effectively.
2. To exercise a responsible influence to improve policies, practices, and services that affect people's lives, both locally and nationally.

Value of Volunteering:

Volunteers are at the heart of our service. We aim to attract volunteers that represent the community we serve, so that fellow citizens come together to provide help and support to those in need. As members of the community themselves, our volunteers understand local needs and promote fair and accessible services. This is a model of community social responsibility that helps build long-term resilience.

We want to attract volunteers from across our community from all ages and backgrounds. Our service can only be truly accessible and responsive to the needs of our community if we represent that community in our workforce and are enriched by the knowledge, skills, and diversity everyone can bring.

Volunteer Role Description:

Summary of the Role:

The following information explains the role of a Volunteer Adviser in our service. Please be assured that anyone volunteering as an adviser is not expected to come to the service with all the skills and knowledge required to undertake the role. This can be achieved through training, practical experience, coaching, and mentoring. We are looking for people who are willing to learn and have an interest and desire to help others and provide an excellent service to everyone in their community.

Anyone joining the service undergoes an extensive period of training and assessment to become a Volunteer Adviser. This training and our assessment of your skills and values are essential for a Volunteer Adviser to carry out their work effectively and to the standards required.

Support is also given through supervised practice and mentoring, high-quality coaching and feedback, and support and supervision from your allocated line manager.

Regular Volunteers' Meetings and Continuous Professional Development Sessions are held, which are designed to ensure volunteers keep up to date with new legislation and policies. These also give volunteers a chance to meet and engage with other colleagues. We expect and encourage volunteers to attend these meetings.

When the Volunteer Adviser training is completed, there are many other opportunities to attend further training, to undertake other support roles for the organization, to become a specialized caseworker, as well as become a mentor for future trainees.

What does a Volunteer Adviser do?

The role is always varied and interesting. Key tasks involve:

- Providing a welcoming, caring, and compassionate response to those in need of help and support.
- Providing a listening ear and working at the client's pace.

- Ensuring the client understands their right to confidentiality.
- Undertaking a diagnostic interview to build a comprehensive assessment of the client's circumstances, identifying the problem and all relevant issues.
- Providing information and advice that enables the client to make an informed choice about the best course of action.
- Supporting the client to create an action plan in line with their support needs.
- Empowering and supporting the client to take action themselves whenever possible.
- Helping make sure the client understands the choices and options available to them and their right to decide the course of action.
- Providing practical help to clients when required, such as drafting letters, supporting phone calls, and helping fill in forms.
- Negotiating with third parties on the clients' behalf.
- Performing calculations (e.g., to assess benefit entitlement, examine income and outgoings, or assess the best tariffs someone could be on).
- Providing a warm handover and referral to other agencies if they are better placed to help.
- Maintaining accurate and complete case records of client files.
- Identifying social policy concerns – working to prevent future problems by identifying issues that affect a lot of clients.

Person Specification:

The main qualification you require is to be kind, caring, and compassionate, with a desire to help others in need and a commitment to work as part of our team. We will provide comprehensive training and ongoing support and resources to enable you to undertake your role.

The Citizens Advice Adviser Training Program and our internal information system 'AdviserNET' will give you a great start. Here are some of the skills we look for and will help you to build:

- Care and compassion for others and an interest and desire to help everyone who needs our advice and support.
- Commitment to the role and understanding that as a regulated service, you must adhere to our regulatory standards, including a regular time commitment, following process and procedures, and participating in team meetings, support and development sessions, and ongoing training (Continuous Professional Development).
- Good listening skills.
- Good research skills.
- Ability to work well in a team as well as independently.
- Good spoken and written communication and basic numeracy.

- Ability and desire to use IT systems for research, case recording and management, training and communication (both internal and external), and willingness to learn and adapt to new developments in technology as required.
- Able to read and understand sometimes complex information to explain it to others.
- Open-minded and non-judgmental towards people and their circumstances.
- Ability to adhere to CAB principles of confidentiality and impartiality.
- Good computer skills, including typing and the use of email.
- Enjoy helping all kinds of people.
- Ability to work under pressure and adapt to change.
- Willingness to learn and develop new skills.

Our Training Program:

Our Adviser Training Program (ATP) is a formal training program that covers the main topic areas dealt with by advisers, such as benefits, money and debt, housing, employment, and immigration.

Training is delivered through a mixture of online self-directed learning and onsite bureau practice.

There are 34 online modules to complete, which can be accessed at home or within our premises. These are normally completed as 4-5 modules per week over 8 weeks. Each module takes around 1 to 2 hours to complete. You must successfully complete all 34 modules. They provide a mixture of learning and include a basic assessment to ensure you have understood and know how to apply their content.

In addition to the modules, you will receive input from other volunteers and members of our team, who will share their knowledge and experience of the role and provide more in-depth information about their particular areas of expertise.

During the second stage of training, you will have access to a fellow volunteer adviser mentor. They will provide you with guidance and support at every step, and you will receive a detailed assessment of your progress and areas for learning and development.

There is continuous assessment so that both you and the organization can help provide you with tailored support and development and ultimately decide if the role is right for you. You will have regular opportunities to engage with other volunteers to share experiences and learning, as well as your allocated line manager for support and development.

The full training program normally lasts for 6 months.

As a Citizens Advice Bureau, we are required to meet the standards for Membership to the Association of Citizens Advice Bureau in Scotland, and we need to comply with regulatory standards set by the National Standards for Information and Advice Providers in Scotland, the Information Commissioner's Office, the Office for Immigration Services Commission, and the Financial Conduct Authority.

Support and Development:

All new Volunteer Advisers undergo the Adviser Training Program and ongoing training to meet the required competencies for the role.

Volunteer Advisers are allocated an individual line manager to support them in their ongoing development. A minimum of 35 hours per year is to be prioritized for CPD, and appropriate records maintained.

Training and development needs will be identified through regular case checking feedback and biannual 1-1 meetings with their allocated manager.

Regular volunteer training and briefing sessions will take place across the organization, in addition to monthly volunteer team meetings.

Experienced Volunteer Advisers can take on additional roles such as being Mentors for new advisers, Sessions Supervisor for support during advice sessions, Quality Assurance, Specialist caseworkers and Tribunal Representatives, as well as training to become a Tutor teaching in our Adviser Training Program. It is also hugely beneficial to the organization if you can volunteer additional time to help out with administration, reception, and maintenance.

Further details about all of services, our history, our aims, our key achievements, and our personnel can be found on our website www.citizensadviceedinburgh.org.uk