



Sir Penfro  
Pembrokeshire

# Volunteer Role Profiles



## Role Profiles

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## 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**

- 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 relevant 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.
- 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.

The day-to-day running of a Citizens Advice can develop volunteers' practical skills, such as problem solving, communication and team work, as well as boost their self confidence and belief in their abilities. This improves employability, presents career development opportunities, and can help those currently unemployed to move into work. All our volunteers learn a practical skill through volunteering



## **Caseworker Admin Assistant**

### **Purpose of the role**

- To improve the service to clients and help the organisation in meeting funders' needs by undertaking a range of activities to support caseworkers.

### **Main duties and responsibilities may include:**

- Follow up clients to ascertain the outcomes of advice.
- Recording outcomes.
- Closing files.
- Completing file reviews.
- Assisting with form applications.
- Completing evaluations and measuring impact.
- Researching possible sources of funding for individuals and families in need.
- Completing client satisfaction surveys.
- Following up calls with professionals where necessary.
- Liaising with health professionals to gather appropriate information.

### **Personal skills and qualities that a caseworker assistant needs:**


- Understanding of, and commitment to, the aims and principles of the Citizens Advice service and its equality and diversity policies.

- Understanding of the issues affecting society and their implications for clients and service provision.

**Personal skills and qualities that a caseworker assistant needs contd.,**

- Willingness to learn and develop skills in main enquiry areas.
- Ability to use IT e.g. basic keyboard / data entry skills / navigation of the Citizens Advice website.
- Friendliness and approachability.
- Sensitivity to the needs of others.
- Flexibility and willingness to work as part of a team.
- Good communication skills, both written and oral.
- Ability to access relevant signposting information including electronic and written materials.
- Understanding of bureau procedures and the way in which the bureau works.

**“volunteering can also develop an individual’s softer skills, resilience and other personal attributes. This can have a positive impact on how people feel about themselves, how they respond to others and their capacity to manage life’s challenges “**



## Reception worker

**Purpose of the role**

- To welcome clients, provide information and ensure they are dealt with according to bureau systems.

**Main duties and responsibilities may include:**

- Operate the reception and provide information.
- Welcome clients coming into the local Citizens Advice contact area.
- Explain waiting times and procedures to clients.
- Provide information about the Citizens Advice 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 gateway / advice session supervisor appropriately.
- Work within agreed bureau systems and procedures.
- Answer the telephone and 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 point out 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.
- 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.
- Use IT for record keeping.

**For retired individuals, CAB volunteering offers new opportunities, provides structure and a sense of purpose, helping them feel involved in society, all highlighted as vital to personal wellbeing.**

## **Research & Campaigns worker**

### **Purpose of the role**

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

### **Main duties and responsibilities include:**

Provide support and guidance to advisers on research and campaigns work

- help advisers to identify suitable cases for research and campaigns work.
- check completed Bureau Evidence Forms.
- give feedback to advisers and managers on completed Bureau Evidence Forms.
- complete Bureau Evidence Forms from advisers' Quick Evidence Forms.
- submit completed Bureau Evidence Forms to Citizens Advice.

Keep up to date with research and campaigns issues

- monitor trends in bureau enquiries, to identify issues for potential local or 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.

- network with other local groups and agencies involved in research and campaigns work.

#### Maintain the profile of research and campaigns within the bureau

- report on research and campaigns issues at workers' meetings.
- promote discussion on research and campaigns issues and campaigns.
- contribute to the bureau's annual report.
- make a regular oral or written report to the bureau management team.
- make a regular oral or written report to the Trustee Board.
- involve advisers in appropriate research and campaigns activities.

#### Contribute to learning about research and campaigns

- act as main contact on research and campaigns issues for bureau trainees.
- provide one-to-one coaching on research and campaigns issues for advisers, as required.
- 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.

#### Contribute to effective research and campaigns work within the bureau

- review the effectiveness of existing research and campaigns work.

- review the priorities for research and campaigns work within the bureau.
- evaluate bureau research and campaigns initiatives.
- make proposals for new research and campaigns initiatives.
- produce written reports on any of the above, as required.

#### Professional development

- attend relevant internal and external meetings, as agreed with the manager.
- participate in own supervision and appraisal.
- identify own learning needs and appropriate ways of meeting them.

#### Administration

- develop and maintain an effective system for handling Bureau Evidence Forms.
- develop and maintain systems for recording and monitoring research and campaigns work in the bureau.
- maintain detailed records for the purposes of information retrieval, statistical monitoring and reporting.
- work within the bureau's wider systems and procedures.

#### Other duties and responsibilities

- uphold the aims and principles of the Citizens Advice service.

- work within the service's policies and values, especially equal opportunity and anti-discrimination policies.
- work within health and safety guidelines and principles, sharing responsibility for own health and safety and that of colleagues.
- carry out any other appropriate tasks requested by the manager, to ensure the effective delivery and development of the service.

**Personal skills and qualities that a research and campaigns co-ordinator / worker needs:**

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 CAB clients.

commitment to the aims and principles of the CAB service.

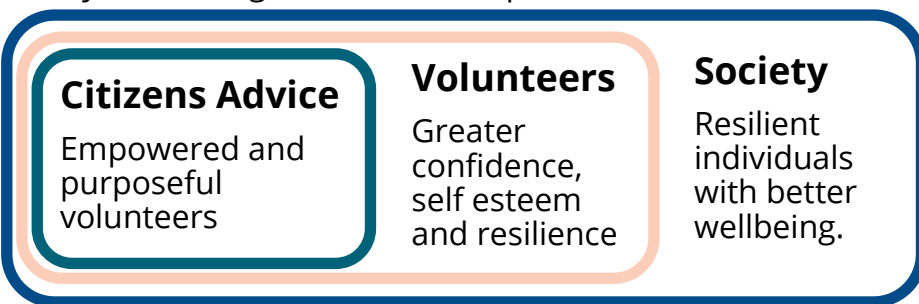
ability to give feedback clearly and sensitively.

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.



## **Interpreter / translator (Welsh/BSL)**

**Purpose of the role**

- To assist in making the organisation accessible for those for whom English is a second language.

**Main duties and responsibilities may include:**

- Translating current posters and leaflets.
- Interpreting advice for those for whom English is a second language.
- Assisting in bringing greater awareness of other cultures to the organisation.

**Personal skills and qualities that an interpreter / translator needs:**

- A commitment to the aims and principles of the Citizens Advice service.
- Fluency in English and another language.
- To understand the importance of confidentiality.
- Excellent communication skills, both orally and in writing.
- A willingness to attend training and other meetings.
- To be approachable and friendly.
- Impartiality.
- To be able to work as part of a team.
- Able to recognise their own limits and boundaries in the role.
- Able to keep calm under pressure.
- Desirable: Skills and training independently verified / member of a professional body.

# Telephone / Digital Advisers

## **Purpose of the role?**

- Telephone Adviceline Assessors deal with initial phone enquiries from clients, and, if they need further advice, help them work out the best ways to deal with this.

## **Main Duties and responsibilities**

- assess the client's issues using listening and questioning skills across the different mediums of telephone, web chat & email
- Answers 'overflow' calls from local Citizens Advice, so clients may be contacting from anywhere in Wales.
- Identifying the nature of the client's problem, and whether the Citizens Advice can help
- Alerting supervisors if clients have emergencies or urgent advice needs, and if you need support to answer their queries
- Assisting clients to use the Adviceguide website and other on line resources to access self-help information
- Guiding them through this information and explaining it to them clearly
- Helping clients access additional advice services where needed, including transferring calls to other agencies where appropriate
- Using the Citizens Advice's PETRA case recording system to record information about the support given
- Identifying social policy issues, and contributing to Citizens Advice Pembrokeshire's policy and

- Being respectful and supportive of clients at all times, including those with disabilities, language issues and other barriers to accessing the service
- Maintaining client confidentiality
- Undertaking training that is relevant to your role as a volunteer.

## **Personal skills and qualities**

- Excellent verbal communication skills including telephone skills.
- Good IT skills, particularly the ability to type and use the internet.
- Ability to access relevant information including electronic and written materials, and explain these accurately to clients.
- Good numeracy and literacy skills.
- Willingness to work within the Citizens Advice aims and principles, including confidentiality and equalities (training will be provided) .
- Willingness to accept supervision and training and act on feedback given .
- Friendliness and approachability.
- Flexibility and willingness to work as part of a team
- Awareness of the potential needs of, and demands placed on, vulnerable clients.





## **Financial capability volunteer**

### **Overall purpose of the role?**

- Financial capability work gives people a basic financial education to help them make better budgeting, borrowing, saving and banking decisions. It aims to encourage people to manage their finances more effectively and help people take control before they reach crisis point.
- Within this role you will be working alongside the financial capability trainer and helping to develop and deliver financial education to individuals and groups.

### **Main Duties and responsibilities**

- Delivering financial capability sessions in an interesting and engaging manner; covering debt prevention, money management skills such as budgeting, using bank accounts, options for borrowing and saving, and dealing with debt.
- Ensuring feedback is received from clients. Review, revise and improve sessions and materials in the light of feedback.
- Making accurate records of education sessions and clients seen, using bureau case recording systems and other monitoring systems required by funders.
- Planning financial capability sessions appropriate to the needs of the individual client, and working with them to develop action plans.
- Identifying social policy issues arising from work with clients.
- Making referrals for advice appointments where appropriate.

- Keeping up to date with developments in financial capability, including attending appropriate training.
- Attending bureau meetings and financial capability regional forums, and other national events where appropriate.

### **Personal skills and qualities.**

- Understanding of, and commitment to, the aims and principles of the Citizens Advice service and its equality and diversity policies.
- Excellent communication skills.
- Understanding the basics of coaching and motivating individuals.
- Understanding the basics of money management, and of the skills and confidence required to manage money effectively.
- Understanding the difference between financial capability training and debt advice.
- Friendly and approachable.
- Able to work as part of a team.
- Respect for views, values and cultures that are different to their own, and an empathy with clients.
- Understanding why confidentiality is important.
- A positive attitude to self-development and assessment.

## **Trustee**

### **Main duties and responsibilities for all trustees**

Each individual member of the trustee board has a responsibility to contribute to the discharging of the board's duties. They can do this by:

- maintaining an awareness of the business of the local Citizens Advice
- taking responsibility for their own learning and development
- regularly attending, preparing for and taking a full part in meetings
- actively contributing to setting policy and strategic direction, defining goals, setting targets and evaluating performance
- monitoring whether the service complies with its governing document, whether it meets Citizens Advice standards and how well the advice needs of the local community are being met
- monitoring the financial position and ensuring that the local Citizens Advice operates within its means and objects, and that there are clear lines of accountability for day-to-day financial management
- supporting the development of the local Citizens Advice through participation in agreed projects
- actively seeking to further the strategic objectives of the local Citizens Advice, and acting in its best interests at all times
- maintaining confidentiality about any sensitive or confidential information received in the course of duties as a trustee.

### **Personal skills and qualities for all trustees**

- Each individual member of the trustee board brings skills and qualities to the board. They add to the collective knowledge and experience by providing:
- commitment and availability to attend trustee board meetings
- effective communication skills and willingness to participate actively in discussion
- willingness to gain knowledge of local needs and resources
- commitment to the aims, principles and policies of the Citizens Advice service, including those relating to equal opportunities, independence, and research and campaigns
- willingness and ability to act in the best interests of the local Citizens Advice
- ability to understand and accept their responsibilities and liabilities as trustees and employers
- willingness to participate in democratic process which develops Citizens Advice policies by area and nationally
- numeracy to the extent required to understand accounts with the support of a treasurer
- willingness and ability to learn, and to develop and examine their own attitudes
- ability to think creatively and strategically, and exercise good, independent judgement
- ability to work effectively as a member of a team.

## **Trustee Contd.,**

### **Time Commitment**

Trustee Board meetings are held 4 times per year in Haverfordwest between 2pm and 4.30pm. We allow for a pre-meeting of ½ hour to discuss any matters of confidentiality. The AGM is held in June.

Detailed discussions take place through a number of sub-committees and it is expected that each trustee will be a member of at least one of these:

### **Four or Five meetings per year of the:**

Finance Committee

Business & Development Committee

Health and Safety Committee

### **Meetings as required but no less than 2 per year**

Personnel Committee (to be amalgamated with H&S committee during 2017)

There is also a very small group meeting to discuss Research & Campaigns.

We also intend to hold 1 or 2 Trustee 'away days' for training, development and discussion of matters which may arise due to major changes. These will be held locally and discussed in board meetings beforehand

## **Digital Welfare Volunteer**

### **Location**

Based at Haverfordwest but may be required to work at various locations across Pembrokeshire. Expenses will be met in accordance with Pembrokeshire Citizens Advice expenses policy.

The Government's 'Digital by default' approach to benefit applications and job searching is causing problems across the country and the digital divide is growing.

Job seekers are now expected to have an email account, Universal Job Match account, on-line CV and to be able to search and apply for jobs online.

We need volunteers to assist our Digital Inclusion team and help our clients navigate the new systems.

### **What will I do?**

- Assist at a job club in either a Library or Job centre setting.
- Support job seekers with their online job searches using websites such as Universal Job match and Indeed.
- Provide assistance with typing, writing job applications, covering letters.
- Create Universal Job match accounts for jobseekers.
- Create email accounts and show clients how to compose, send and read emails.
- Help to create a sympathetic environment for people to search for work.
- Create and maintain a supportive relationship with jobseekers.

Refer jobseekers to other agencies for further help.

## **What skills and qualities will I need to be a Digi Volunteer?**

- Be confident using a computer, for example sending and receiving emails, attaching files to emails, searching the internet, uploading files to the internet etc.
- An ability to offer help appropriately and sensitively in a public environment.
- An understanding of why confidentiality is important.
- Excellent communication skills.
- Being open and approachable.
- Respect for views, values and cultures that are different from your own.
- A commitment to the aims and principles of the Citizens Advice service.
- A positive attitude to self-development and assessment.
- Ability to work as part of a team.
- Ability to recognise the limits and boundaries of the role.

## **What's in it for me?**

- Make a difference to someone's life.
- Boost your confidence
- Do something interesting
- Meet new people
- Improve your prospects
- Get to know your community
- Put your talents to use

## **What training will I have?**

- A full induction training programme is provided and you will have the support of a supervisor throughout your time volunteering with us.
- Training specific to the Digital Inclusion role (e.g. Universal Job Match)
- Training delivered at team meetings

## **About Citizens Advice Pembrokeshire**

Citizens Advice Pembrokeshire is a registered charity, The company and charity was created in September 2007 in preparation for the merger (April 1<sup>st</sup> 2008) of the Haverfordwest and Pembroke & District Citizens Advice Bureaux which had been operating as separate legal entities. The county wide service operates out of the two original offices based in Haverfordwest and Pembroke Dock. The main administrative office for the charity is based in Haverfordwest. The LCA is a member of the National Citizens Advice organisation and deals with approx. 14,000 client issues per year for the people living in the mainly rural county of Pembrokeshire.

To ensure equality of access to our services, we have 9 established service outreaches in locations ranging from Newport in the north to Saundersfoot in the south of the County. We run a variety of projects which focus on Debt and Welfare Benefits work in specified locations and / or targeted at specific eligible client groups.

Community focussed work includes a Financial Capability, Energy Advice, Digital Inclusion and Volunteer Engagement. We work closely with Shelter (Housing issues) who reside in our Haverfordwest office and operate outreach services from our Pembroke Dock office and other locations.

People can access our services via drop-in, appointments, telephone, a webchat service and e-mail.

Enquiries come to us from all types of people at different stages of life and in a wide variety of situations; issues presented are wide-ranging in nature and complexity. The largest categories of enquiries fall within debt, benefits, housing, family and relationship issues, employment and general legal issues.

# Training

## What training will I have?

Training will be provided before you start your volunteering, and you will always have the support of a supervisor.

[www.pembscab.org.uk/volunteering](http://www.pembscab.org.uk/volunteering)



Sir Penfro Pembrokeshire

## Our impact in 2017/18

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Anyone can have a problem

**8 in 10 people**  
Felt less stressed, depressed or anxious

**1 in 2**  
Had more money or control of their finances

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Who we helped

**More than 6,000**  
helped by face to face appointments / phone/ email or webchat

**Over 13,000 issues**  
people sought our help with

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How we do this

**11 locations**  
where we provide free and independent support

**55**  
dedicated local staff and volunteers

**£219,169**  
estimated worth of donated hours by our 37 volunteers

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The difference this makes

**2 in every 3**  
Clients had their problem resolved

**3 in 10**  
Found it easier to do their job or find a job

**£2,759,125**  
Total financial gains for local clients

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All of this benefits individuals and society

What clients thought of our service 2017/18	
Happy with the time given for the discussion	98%
Found the information easy to understand	100%
Rated the service good or excellent	100%
Would use the service again	100%
Would recommend to family and friends	100%

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# How to contact us

## **By Post**

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Citizens Advice Pembrokeshire  
43 Cartlett  
Pembrokeshire  
SA61 2LH

**By Email:** [recruitment@pembscab.org](mailto:recruitment@pembscab.org)

**By Phone:** 01437 767936 - leave a message and we will contact you

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