

# Training to be an Adviser



**citizens  
advice**

**North  
Somerset**

## What sort of person are we looking for?

You don't need specific qualifications or experience to train for any of our volunteer roles.

To become an adviser you do need:

- an ability to understand complex information
- to be polite and good at listening
- to have strong IT skills
- to be able to input data accurately
- a good level of literacy and numeracy
- to be open minded and not judge clients
- to enjoy helping people.



## Before starting to volunteer

Citizens Advice North Somerset starts training a group of volunteers every few months. We are happy to meet with any potential volunteer to explain the nature of the work and the commitment involved before they fill in an application form.

The best way to understand what is involved is to attend one of the introduction half days (when they are available). At one of these sessions potential volunteers learn about the

ethos of Citizens Advice and the sort of work we do. They also get the chance to have a go on our information system, meet some of the staff and see some of the training materials.

We ask potential volunteers to fill in an application form with the names of two referees, whom we write to if we accept them as a volunteer. You will also need to provide us with one form of photo iD (let us know if this is a problem).

## **What time commitment is required?**

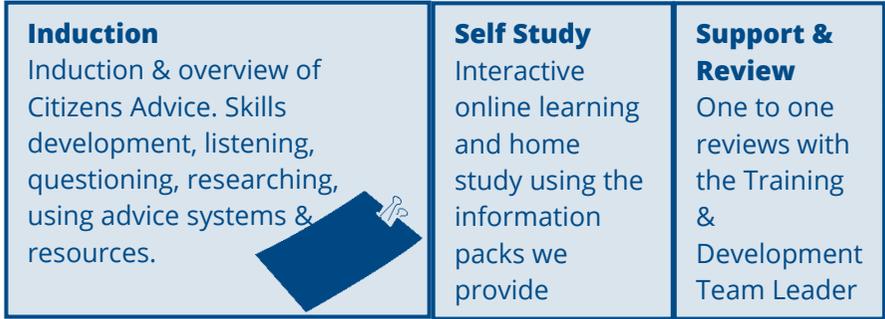
Due to the nature of our work and the amount of training required we do ask volunteers (when training) to work an average of 12 hours per week which equates to 1 day or 2 half days per week classroom/Zoom training plus additional time for online training and observing client interviews. Training takes place in Weston or on Zoom.

When qualified, the hours are generally from 9.15 – 3.30-4pm on one day per week or 2 half days.

Once you are qualified as an adviser you can be flexible about which days you work but we do need to know in advance so that we can arrange for the advice sessions to be effectively staffed. We do of course recognise that volunteers will need to take time off and just ask for as much notice as possible so that cover can be arranged.

# Adviser Training

Initial training will take approximately 3 – 6 months. Your training programme will be tailored to your interests, availability and pace of learning.

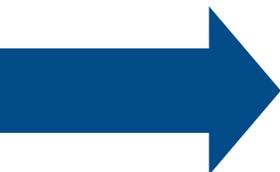




<b>Self-Study and review</b>	<p><b>Workshop</b> Knowledge development, Debt, Benefits, Housing, Employment etc. Skills practice using case studies.</p>	<p><b>Shadowing</b> With an experienced volunteer across a range of roles to understand the services we offer</p> 
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<p><b>Active Participation</b> Begin performing role fully when training complete &amp; signed off</p>	<p><b>Team Leader Observation</b> Face to face advisers, phone advisers and email adviser</p>	<p><b>Side by side</b> Trainees for face to face advisers, phone advisers and email adviser begin participation alongside an experienced volunteer.</p> 
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- 1 - 3 Months
- 3 - 6 Months
- 6 - 12 Months
- Ongoing

## **What sort of work do volunteers in the advice services team do?**

Advice is given face to face, on the phone or via email.

Advisers quickly collect the key facts to establish the vital core of the query. They then decide which is the most appropriate next step to take. The client could be given information which they can use to move the matter forward themselves, have a generalist or specialist appointment made or be signposted to an external agency.

Sometimes you will give more generalist advice where the adviser takes a comprehensive, holistic approach to the query, assessing the options and their consequences and enabling the client to take further action. Sometimes negotiation is done with third parties on behalf of the client.

## **What will I be involved in?**

All of the above! Your training will be focussed on both face to face, email and telephone advice supporting you with giving generalist advice and working with clients.

## **Is there support available?**

At every session there is an Advice Session Supervisor available, who will answer questions. This means that an adviser is never without help at hand.

## **Ongoing training**

There are in-house training courses run by Citizens Advice and other related agencies for volunteers who have passed the initial stages of training. We highly recommend that volunteers attend as many of these as possible and will work with you to identify the most appropriate courses.

There are also e-learning and bite size sessions on a variety of areas on the dedicated Citizens Advice website. We encourage our volunteers to look at as much of this as possible.

## **Volunteer Appraisals**

All volunteers can expect ongoing discussions with their line manager as well as an annual appraisal. As a minimum the appraisal will cover the following;

- Performance & progress to date
- what the volunteer is enjoying about the role
- whether they need extra support
- if they would like to expand or change what they are doing
- whether they would like more training
- how they are getting on with staff, clients and other volunteers.

## Staff meetings

We have 10 staff meeting per annum which are usually held on the first Thursday of the month (except for January and August).

Staff meetings will cover:

- Training updates
- Operational news
- Staff consultations
- Discussions about ongoing issues & new procedures
- Guest speakers

All volunteers are encouraged to attend as many of these as possible.

