

Volunteer Gateway Assessor Role Description

Citizens Advice Merton & Lambeth (CAML) provides information, advice and casework across the London Boroughs of Merton & Lambeth. It does so at its three offices in Streatham Hill, Mitcham and Morden, over the phone and the internet.

CAML deploys volunteers and employs paid staff in a range of different roles. It is committed to ensuring that all volunteers and staff are properly supported and supervised.

About this role

Volunteer Gateway Assessors help customers to determine the next step they need to take in their particular circumstances. They assess customers' needs and problems, either over the phone, by email, webchat or face to face, and empower them to take the next steps which may include self-help information, signposting to a specialist organisation or in some a cases, an appointment with a CAB adviser.

Volunteer gateway assessors are supervised by the Office Manager or Contact Centre Team Leader who supports them to identify the most appropriate course of action for customers.

Location: Our offices are in Mitcham, Morden and Streatham Hill. Volunteers will need to work across all 3 offices.

All new Gateway Assessors start work on the telephone at the call centre in Mitcham. Once you have completed your training and received your certificate, you would be eligible to start working as part of the face to face gateway service.

Hours: 9.30am – 4.30pm. Because all Gateway Assessors will be working on the telephones, open from 10 until 4, you will need to be able to volunteer for a full day (9.45am - 4.15pm as a minimum).

Days: 2 week days (Monday – Friday) each week.

Length of commitment: Due to the time invested in training we ask that people try to volunteer with us for at least a year

Managed by: Contact Centre Team Leader (on the phones) or Office Manager (face to face service)

Main tasks include

- Assessing customers' problems by phone, via email or webchat, or face to face
- Identifying key information about the problem including time limits, key dates and any requirement for urgent advice or action
- Establishing what the customer wants

- Assessing and agreeing the next step which needs to be taken taking into consideration the customer's ability, the complexity of the problem and the service's resources
- Enabling and empowering the customer to take the next steps
- Recording information collected and given during gateway assessment onto the case recording database
- Identifying any discrimination and following the service's procedures for dealing with discrimination issues
- Identifying appropriate cases for Research and Campaigns work and submitting evidence
- Keeping up to date with and working within relevant legislation, policies and procedures
- Working collaboratively and consulting with other colleagues involved in the advice work process
- Dealing with customers sensitively and with respect
- Maintaining confidentiality about customers and their contact with the service
- Preparing for and attending supervision sessions and team meetings
- Undergoing relevant training

What we are looking for

- Good interpersonal and communication skills, including being comfortable using the phone
- Friendliness, approachability, adaptability and the ability to work with members of the public as customers
- A good standard of written and spoken English and numeracy
- A good standard of IT skills; the ability to use word, outlook/email and the internet effectively
- The ability to work well with others and to contribute effectively as a member of a team
- Quality – the ability and willingness to maintain high standards, to monitor own standards and enthusiasm for continuous improvement.
- Awareness of the potential needs of, and demands placed on, vulnerable customers
- Willingness to learn and understand service procedures
- Understanding of, and commitment to, the aims and principles of the CAB service

What we offer

- A full induction into the service and your role
- Initial and ongoing training appropriate to your role
- Support and supervision throughout your volunteering
- Reimbursement of reasonable out of pocket travel expenses whilst volunteering
- Valuable exposure to the work of Citizens Advice, the UK's largest advice service