

## Becoming an Assessor

The following notes explain the role of an Assessor. They are set out as answers to questions you may have- click as appropriate to go to the one that interests you:

- ◆ [What is the background to the role?](#)
- ◆ [What do Assessors do?](#)
- ◆ [What is an assessment interview?](#)
- ◆ [What is the regular time commitment?](#)
- ◆ [What training will I be given?](#)
- ◆ [What computer systems will I use?](#)
- ◆ [How many assessments will I be expected to handle?](#)
- ◆ [What qualities do I need?](#)
- ◆ [What will I get out of it?](#)
- ◆ [Can I go on to be an Adviser?](#)
- ◆ [Do you pay expenses?](#)
- ◆ [What do I do next?](#)

### What is the Background to this role?

In March 2009 we implemented the first phase of a major new initiative (our Access Program) to make Wokingham Citizens Advice more accessible to everyone throughout the Borough. We wanted to provide an effective assessment service for clients so that we could agree with them at the start how we could help them or whether their needs would be best served by another agency. This has enabled us to book more clients for timed appointments rather than telling them to drop-in. In October 2015 we joined Adviceline which means that our assessors on the telephone in our Wokingham office work with other bureau in the Adviceline consortium.

### What do Assessors do?

Assessors are the first point of contact between many of our clients and the Bureau. Many people who access us either by phone or in person have never sought help from us before and may be nervous or upset. Assessors try to put clients at ease; listen to and explore the problem and agree with the client a suitable *Next Step* for the client to take their problem forward.

The most common issues dealt with are Employment; Benefits; Debt; Housing and Relationship Breakdowns but clients contact us on almost any subject.

As an Assessor you will work in a team of 2 to 4 people with full support from a dedicated and experienced supervisor. Much of the work is done by telephone but Assessors will also work face-to-face with clients who prefer to call at the

Bureau rather than telephone. You will have detailed scripts, comprehensive information and computer support to help you to deliver a quality service.

Specifically an Assessor:

- ◆ Undertakes 10-15 minute telephone or in person assessments with clients using the scripts and procedures provided by the Bureau
- ◆ Explores client problems to the level required to agree the *Next Step*
- ◆ Discusses and agrees an appropriate *Next Step* with each client
- ◆ Manages the interview process in a welcoming, empathetic but professional manner
- ◆ Works in active partnership with his/her supervisor
- ◆ Makes accurate case records of work with clients on our on-line case recording system
- ◆ Helps out with answering emails when necessary

### **What is an Assessment Interview?**

A key feature of our Access program was the introduction of the Assessment Interview. These focussed interviews take 10-15 minutes. A trained assessor reviews the client's problem and identifies the most appropriate way to take it forward: we call this the *Next Step*. The *Next Step* could be to:

- ◆ Direct the client to the appropriate section of the Citizens Advice website or other trusted website (Assisted Information)
- ◆ Send a leaflet or fact-sheet (where client has no Internet access)
- ◆ Signpost to an appropriate external agency
- ◆ Offer an appointment with a generalist or specialist adviser or advising the client to drop in to the Bureau
- ◆ Allocate the query to an experienced adviser to research and reply to the client
- ◆ Initiate (in conjunction with the supervisor) immediate action to handle emergencies

We make extensive use of the Internet both to diagnose client problems and to direct clients to suitable websites and fact sheets (especially from Citizens Advice). Other essential tools for assessors are our Internet based local information system, an on-line case recording system and an electronic diary.

### **What is the regular time commitment?**

After you have finished training, we ask that you are on duty for two 3-hour shifts per week. The Wokingham shifts run from 9.00 to 12.00 and from 12.00 to 15.00 on Mondays to Thursdays and 09.00 to 13.00 on Fridays. Where possible we would like you to work your two shifts on different days. Telephone assessment is quite intense and in our experience it is very hard to maintain the

focus needed to offer 6 hours of assessment in one day. Assessors working the morning shift will need to be in the Bureau by 8.50 to attend the morning staff meeting.

As a volunteer there will be no legal contract between us, but we ask that when you join you intend to complete at least 6 months service following training.

### **What training will I be given?**

The basic training for Assessors is known as the modular program. There will be formal training in Wokingham from 9.00-12.00 on Thursday mornings for approximately 8 sessions. Attendance at all sessions is mandatory. In addition trainees will have to commit to self-study between training sessions.

All trainees might also have to attend a one day Citizens Advice Course to learn more about the assessment process before they can work with clients.

After you complete basic training, we offer further refresher training to help you refine your skills and keep up to date with the latest trends and developments.

### **What computer systems will I use?**

This role makes extensive use of Information Technology. Assessors use a hands-free headset to take telephone calls.

### **During the interview**

Client details are entered directly into our on-line case management system (Petra). Information is given to clients using Internet Explorer from Wokingham Citizens Advice web site; the national Citizens Advice web site and other trusted web sites. Appointments are made using our own electronic diary system.

### **After the interview**

Hand written notes are made of the client's problem and the Next Step agreed. These notes are typed into PETRA after the interview is complete. Full training will be given web sites we use and in the Petra system and our electronic diary.

### **How many assessments will I be expected to handle?**

Experienced assessors aim to complete each interview in around 10 minutes although with upset or confused clients this can take longer. At the end of each interview you will need another few minutes to write up your case notes. We have found that at the start assessors can expect to handle one or two clients per hour.

### **What qualities do I need?**

As we provide full training, we do not ask for any formal qualifications or experience - although we will of course make good use of relevant experience. The qualities we look for are:

- ◆ Excellent literacy and numeracy skills
- ◆ Good communication skills on the telephone, in person and in writing
- ◆ Interest in developing customer service skills
- ◆ Familiarity and confidence to work with modern computer systems
- ◆ Warmth, empathy and openness coupled with confidence to manage the interview process
- ◆ Ability to interact with and respect others from a variety of backgrounds
- ◆ Openness to new ideas and willingness to learn
- ◆ Ability and willingness to work within the aims, principles and equal opportunities of the Citizens Advice service.

### **What will I get out of it?**

Each Assessor gets different rewards and satisfactions from the work and these can change over time.

Some Assessors enjoy making a positive difference, especially for those less able to stand up for themselves. For others the satisfaction is about helping someone to share a problem – perhaps for the first time – and helping them take the first step to resolving it.

We also recognise that some people will be attracted to this role as a way of improving their CV and taking a positive step to finding paid work.

Finally, nearly all of our volunteers mention the pleasures and benefits of working in a team of people from diverse backgrounds who are united in their commitment to give the best possible advice to our clients.

### **Can I go on to be an Adviser?**

Yes – after at least 6 months service as an assessor.

### **Do you pay expenses?**

Our policy is to pay reasonable travel expenses to and from the Bureau for all staff living within reasonable reach of Wokingham. We do not pay childcare expenses.

### **What do I do next?**

If you're interested in applying please telephone us on **0118 978 7258** or email [training@citizensadvicewokingham.org.uk](mailto:training@citizensadvicewokingham.org.uk) or write to The Manager, Citizens Advice Wokingham, Waterford House, Erftstadt Court, Wokingham, RG40 2YF