

ADVICE PLYMOUTH VOLUNTEER ADVISOR

Role Purpose:

To assess Clients' needs using sensitive listening and questioning skills. Provide appropriate information and advice.

Role description:

Interview and assess clients, both face-to-face and on the telephone, to determine and advise on clients' enquiries, help them set priorities and agree an action plan.

Identify key information about their needs including time limits, key dates and any requirement for urgent advice or action (using CRM systems, scripts and any other diagnostic tools, as necessary).

Identify and summarise clients' needs and desired outcomes.

Refer and signpost clients appropriately (both internally and externally) including making suitable arrangements.

When necessary, act on behalf of the client to negotiate, draft or write letters or make appropriate referrals.

Complete clear and accurate case records using CRM systems (PETRA and Charity Log).

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Required skills and qualities:

A commitment to the aims and principles of Advice Plymouth.

Good communication skills both written and oral.

Friendliness, approachability and willingness to work as part of a team.

Ability to access relevant signposting information including electronic and written materials.

Basic numeracy skills.

Sensitivity to the needs of others.

An understanding of why confidentiality is important.

Ability to use a computer in the provision of case recording.

Respect for views, values and cultures that are different to their own .