



LOTTERY FUNDED

Big Lottery Number: AP/2/010291410



Charity registration number 279057

## Peterborough Citizens Advice Bureau

Gateway assessors carry out an initial assessment with the client to decide the best next steps to help the client resolve their problem. This assessment may be face to face or by telephone and will result in; providing the client with information, signposting or referring the client to another provider, or offering a further appointment with a CAB Adviser.

### Role Description

- Assess clients' problem(s) using sensitive listening and questioning skills.
- Identify key information about the problem including time limits, key dates and any requirement for urgent advice or action (using Adviceguide, scripts and any other diagnostic tools, as necessary).
- Identify and summarise the essence of the problem.
- Establish what the client wants.
- Assess and agree the appropriate level of service, taking into consideration the client's ability to take the next step themselves, the complexity of the problem and the bureau's resources.
- Refer clients appropriately (both internally and externally) to suit clients' needs following agreed protocols, including making arrangements and informing clients of what to expect.
- Signpost clients appropriately to suit their needs following agreed protocols.
- Record information given during gateway assessment interviews onto CASE gateway screens.

### Social Policy

- Identify social policy issues
- Assist with social policy work by providing information about clients' circumstances through the appropriate channel.

### Professional development

- Keep up to date with legislation, policies and procedures and undertake appropriate training for gateway assessment.
- Read relevant publications.
- Prepare for and attend supervision sessions / team meetings / staff meetings / external meetings as appropriate.

### Administration

- Use IT for record keeping.
- Ensure all work conforms to the bureau's systems and procedures.

### Other duties and responsibilities

- Undertake such other duties and tasks as may lie within the scope of this post.
- Demonstrate commitment to the aims and policies of the CAB service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

### Person specification

- Understanding of, and commitment to, the aims and principles of the CAB service and its equal opportunities policies.
- Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
- Ability to monitor and maintain own standards.
- Understanding of the main enquiry issues involved in assessing clients' problems
- Understanding of the issues affecting society and their implications for clients and service provision.
- Willingness to learn and develop skills in main enquiry areas.
- Ability to use IT in the provision of gateway assessments, e.g. basic keyboard / data entry skills / navigation of Adviceguide.
- 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.
- Ability to manage time effectively for the purpose of gateway assessment.