

Competences for working outside the bureau (outreach)

1 Give a service that complies with Citizens Advice principles

To do this you need to be able to:

1. Ensure privacy and confidentiality from staff of the host organisation / other clients of the host organisation/ client's family (home visits)
2. Ensure that independence from the host and/or referring organisation or client's family is clear

Before doing this you need to:

- a) *Understand the issues about Citizens Advice principles which may arise when advising in different settings*
- b) *Understand the added importance of informed consent when working outside the bureau*

2 Actively support and implement Citizens Advice equal opportunities and anti-discrimination policies

To do this you need to be able to:

1. Ensure that disadvantaged groups are given full and impartial advice by seeking to overcome any limitations of the setting

Before doing this you need to:

- a) *Understand any particular difficulties for disadvantaged groups in using the setting*
- b) *Be prepared to challenge host organisation*
- c) *Be sensitive to cultural and other expectations when working in the client's home*

3 Contribute to a safe and positive working atmosphere

To do this you need to be able to:

1. Follow the health and safety procedures for the outreach venue
2. Maintain a good and well informed working relationship with the host organisation and its individual staff
3. Behave courteously and respectfully in the client's home
4. Recognise any limitations of the venue and seek to overcome them
5. Take precautions when handling client's money, benefit books, documents etc
6. Follow bureau health and safety procedures for outreach sessions and home visits
7. Follow any health and safety procedures or special rules of the host organisation
8. Maintain an on-going working relationship with the bureau for both one to one support and team-working

Before doing this you need to:

- a) *Know the health and safety procedures relevant to the venue*
- b) *Understand the ethos and working practices of the host organisation*
- c) *Know the roles of key staff in the host organisation and who to contact*
- d) *Be aware of the added risk to the worker of eg accusations of theft when working in the client's home*
- e) *Understand the health and safety issues of doing home visits or outreach sessions, and know the bureau health and safety procedures*
- f) *Be aware of the rules and procedures of the host organisation*
- g) *Be aware of the potential effects of working in isolation from the rest of the bureau team*

4 Give a service which meets the need to maintain quality

To do this you need to be able to:

1. Recognise the limits of the session or home visit and seek appropriate support
2. Recognise bureau limitations and use appropriate outside consultancy
3. Follow bureau procedures for case management including follow up work, case checking and supervision

Before doing this you need to:

- a) *Know bureau procedures for support and supervision of outreach sessions and home visits*
- b) *Know sources of consultancy*
- c) *Understand the process of case management*

5 Manage the advice process

To do this you need to be able to:

1. Manage and adjust the advice process appropriately to allow for the limitations of the session or visit
2. Ensure the client understands any arrangements for future contact

Before doing this you need to :

- a) *Be able to use appropriate technology*
- b) *Know bureau and host organisation procedures for client contact*

6 Manage the practicalities of the advice session

To do this you need to be able to:

1. Take, check, maintain and return resources as needed
2. Follow procedures agreed with host organisation for setting up/ starting session
3. In conjunction with host organisation staff
 - Manage the flow of clients
 - Deal with disturbances in the waiting room
 - Deal with difficult/violent clients
 - Deal with equipment breakdown
4. Note and report problems/trends e.g. systems, waiting room
5. Pass on important/urgent information and issues which are outside your authority

Before doing this you need to:

- a) *Know the resources needed for the session or visit*
- b) *Be aware of the limits of your authority and be able to act with initiative within these*
- c) *Know bureau and host organisation policies and procedures relating to difficult or violent clients*
- d) *Know bureau systems for reporting organisational issues*

7 Contribute to the development of outreach services

To do this you need to be able to:

1. Check and update publicity advertising the outreach session
2. Liaise with the host organisation to exchange information and feedback for the effective working of the outreach session
3. Liaise with groups active in the local community, or institution, to exchange information, receive feedback and promote the effective working of the outreach session
4. Give feedback and suggestions to your manager to help improve the running of the outreach session or home visits

Before doing this you need to:

- a) *Know how and where the session is publicised*
- b) *Understand your responsibilities and the limits of your authority when representing the bureau*
- c) *Know the role of different groups in the community or institution served by the outreach, and how to contact them*
- d) *Recognise the importance of providing information to be used in making decisions about the service*