



# Volunteer Handbook

December 2024



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## Acknowledgements

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Special thanks to staff and volunteers at Edinburgh Citizens Advice Bureau (Leith and Portobello) for giving their time for photography.

# Welcome to Citizens Advice

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Welcome to the Citizens Advice network in Scotland - a network that delivers high-quality, free, confidential, impartial and independent advice.

Each Citizens Advice bureau (CAB) is a charity set up for public benefit with volunteering at its heart. Volunteers like you contribute valuable skills, knowledge and experience to their bureau. They ensure people in their community have access to the advice they need, are informed about their rights and the support available to assert them, and they help their bureau to highlight and campaign on local social policy issues.

Teamwork and positive, supportive relationships between volunteers, staff, managers and the bureau's board of trustees are vital for the success of every CAB. Volunteers are at the centre of every bureau team and the extent of the advice services and social policy campaigning that can be undertaken depends on their contribution.

In addition to making a difference in local communities, citizens advice bureaux form a network of services across Scotland, linked by Citizens Advice Scotland (CAS). Together, bureaux and CAS are referred to as the Citizens Advice network in Scotland. Evidence gathered from local citizens advice bureaux activities informs wider campaigns and impacts national and UK-wide social policy and legislation. Advice and policy, local and national, all play a part in making a difference to people's lives.

One important responsibility of CAS is to ensure that bureaux can provide the best support possible to you as a volunteer. CAS provides this handbook to introduce you to the network and its services and to help you to start to fulfil your volunteer role effectively.



**In our 2024 Volunteer Survey 97% of respondents agreed that they felt proud to volunteer at their bureau.**

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A respondent to our 2024 Volunteer Survey said.....

**“I am so glad I finally applied. Volunteering for CAB has made a huge positive difference to my life.”**

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# The Citizens Advice network in Scotland

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The Citizens Advice network in Scotland has come a long way since the first citizens advice bureau was set up in 1939, with a remit to help citizens cope with the inevitable domestic upheavals should war break out. Today, bureaux deal with a wide range of enquiries across the country.

Life in our diverse society with an ageing population, altered patterns of employment, complex social security systems and changing family and community structures means the work of our network is needed now as much as ever.

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## Bureaux

As mentioned in the introduction, each bureau is a charity. They are independent and locally managed and run. Bureaux may receive funds from local authorities, grants, donations and other charitable sources. Most also receive funds to contribute locally towards provision of one or more of the network's projects which provide services covering Scotland. You will hear these referred to as 'national projects.' Each bureau has a board of trustees (the board) made up of volunteers who are often from the local community and who have the skills, knowledge and experience needed for effective bureau governance. Trustees may also be referred to as members of the board or, if the bureau has adopted the legal form of a limited company, as directors. To operate effectively as an organisation, bureaux usually either adopt the legal form of a limited company or a Scottish Charitable Incorporated Organization (SCIO).

The board will have a business plan for their bureau. Usually, it will have been developed with input from paid staff, volunteers, local stakeholders and partners, and the local community. The plan will include what the board intends the bureau to do or achieve during the coming two to three years or so; this may be distilled in a short mission statement. The plan may also set down a longer-term vision for the bureau.

Whilst each bureau's mission and vision will be different, volunteers will always have a key role to play in delivering them. Ask your bureau for information on their business plan and how your contribution as a volunteer will help them to achieve the mission they have set for themselves.



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**In our 2024 Volunteer Survey 89% of respondents said that they were attracted to volunteer at a CAB by the opportunity to help people and make a difference.**

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# The Citizens Advice network in Scotland

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## Citizens Advice Scotland (CAS)

All Citizens Advice bureaux in the UK are members of a national association. In Scotland, this is the Scottish Association of Citizens Advice Bureaux (SACAB). To carry out its activities as the collective entity of bureaux, SACAB operates as an independent charity, with its own board of trustees on which there is significant representation from the member bureaux. This charity operates under the name Citizens Advice Scotland (CAS) and has its registered office in Edinburgh with another office in Glasgow. CAS receives funding from the UK Department of Business, Energy and Industrial Strategy (BEIS), Scottish Government and other statutory and charitable sources.

The primary role of CAS is to make sure that bureaux in Scotland have the support they need to do their work. The CAS board employs paid staff to provide these support services. CAS works in partnership with bureaux, respecting their autonomy and ways of working.

CAS's services to bureaux include quality assurance, co-ordination of the national projects, shared IT resources (such as the client recording system called CASTLE, the online advice information system called AdviserNet and the public-access version of this system), training and resources to support training delivered by bureaux, specialist level training in debt advice and second-tier support for bureau debt advisers, and support with human resources. The Network Services Team at CAS maintains direct contact with bureau managers and boards and provides them with advice and support in relation to their bureau, as well as providing information on what CAS can offer them and any work that CAS is undertaking to promote and further the aims of the Association.

It is worth noting that the second-tier support to bureau debt advisers is part of a service that CAS is funded to provide to debt advisers in not-for-profit organisations across Scotland, not just to bureau advisers. Also, CAS runs the Extra Help Unit (EHU), which is a statutory support service resolving energy complaints and delivering positive outcomes for vulnerable energy consumers and micro-businesses. Caseworkers in the EHU assist individuals and micro-businesses with energy issues. The EHU works to improve standards within the energy industry. It liaises closely with the regulator and other stakeholders to achieve that aim.



A respondent to our 2024 Volunteer Survey said....

**“Volunteering in my local area lets me give something back to the place that made me.”**

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Another respondent to our 2024 Volunteer Survey said....

**“Volunteering at CAB has been one of the best things I have done in my life!”**

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# The Citizens Advice network in Scotland

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## The network aims, our values, and you

Together, CAS and all the member bureaux provide the Scottish CAB Service and make up the Citizens Advice network in Scotland. As a network, we have two broad aims:

- > To provide free, independent, impartial and confidential advice and information to ensure that people understand their rights and responsibilities and can express their needs effectively.
- > To campaign and influence to tackle the root cause of the problems people face, and to work to strengthen their rights.

Whatever the current missions identified by each bureau or by CAS, these overarching aims are what we all exist to deliver.

The contribution of bureau volunteers is vital to achieving our aims. Across Scotland, that contribution enables provision of an advice service at a consistently high standard. It enables the collection of robust social policy evidence and responsible campaigning and provides bureaux with additional capacity, allowing them to promote their services and raise awareness of social policy issues locally. The time, effort and dedication that volunteers provide to bureaux is the network's most valuable resource; they are the heart and the strength of our service.

In recognition of their commitment, bureau managers and boards endeavour to provide the best possible experience to volunteers. To achieve this, the comments, suggestions and ideas of volunteers are essential. Therefore, all volunteers are encouraged to communicate these to their bureau. Sometimes CAS will also seek volunteer opinion via national surveys, at workshops, or other events. This is so that support to bureaux and network resources for volunteering are aligned to volunteer expectations and needs.

At CAS, we have an agreed set of values that capture who we are, how we work and what we believe in. They were identified through discussion with volunteers, staff and trustees from Citizens Advice bureaux across Scotland and people working within Citizens Advice Scotland. Our values describe how we treat other people, and how we expect to be treated in return. Everyone within CAS has a contribution to make to ensure we live our values.

We believe that these values help us work with direction and purpose in a way that builds strong relationships, delivers positive outcomes for the people of Scotland, and which makes CAS a rewarding place to work. Our values are that we are:

- > person-centred - we are committed to the wellbeing of our clients, volunteers and staff and take a whole-person approach to our work.
- > empowering - we invest in people and support them to take action on the challenges they face.
- > supportive - we are caring and respectful and make sure that people receive the support they need to improve their lives.
- > inclusive - we are non-judgemental, friendly and offer an expert service to anyone who is in need of our help.
- > collaborative - we work together as a network and with other partners in an open, respectful way, to build trust even when opinions differ.

# The Citizens Advice network in Scotland

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Your bureau may have a set of organisational values too and in that case, during the early stages of your training or your bureau induction you will hear about the contribution you can make to ensuring that staff and volunteers there live those values.

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## The network volunteering strategy

To guide the support that CAS provides to bureaux in relation to volunteering, a 4-year strategy has been developed, running from 2023 to 2027. Through a collaborative process, this was co-designed with bureaux to ensure that it meets their needs and the needs of their volunteers. It is underpinned by a vision for volunteering across the network which was agreed as part of the co-design procedure. If you wish to read the strategy, you can download it from [the CAS website here](#). You will need to be signed into the website to access this page, your bureau can supply you with the username and password you should use.

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## The network vision for volunteering

Volunteers are the heart of our network – our ambition is to create a rewarding experience for all volunteers. As a network, we will do this by continuing to create an organisational culture that celebrates diversity and our values to ensure we have a welcoming and supportive environment for our volunteers that includes opportunities for personal development.



# The fourteen principles of the Scottish CAB Service

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SACAB has identified fourteen principles that guide member bureaux. Commitment to and compliance with these principles is a requirement for membership of SACAB. It is important that all staff and volunteers understand these principles.

SACAB has issued a policy statement to affirm a network-wide commitment to ensuring equality of opportunity for all. Compliance with the principle of impartiality requires bureaux to meet the equality standard set out in this statement. The equalities policy statement is covered in the section on bureau policies and procedures.

You will learn about the principles in detail during your training but a summary of each is provided below.

## A free service

Services must be free at the point of delivery regardless of the client's means.

## Confidentiality

Services must be confidential.

## Impartiality

Services must be provided without subjective regard to whether the client is deserving or not.

## Independence

Bureaux must maintain their freedom to offer impartial advice and to act on behalf of clients in accordance with the client's best interests.

## Accessibility

Bureaux must endeavour to ensure that their services are accessible to all in their community. For example, bureaux will actively recruit a range of volunteers to reflect the diversity of their local community. They will also try to extend services to clients who cannot use their main channels of advice delivery.

Achieving accessibility is not easy. It is not only a question of ease of physical access to bureau premises and outreach venues and it requires flexibility on the part of bureaux teams. There are many issues to think about: travel time and travel costs may be an issue; many people in Scotland are digitally excluded so cannot access online advice or information about bureau services or take advice by e-mail or webchat; some people rely on a mobile telephone but live in an area of poor reception or cannot maintain credit for making calls.

To be compliant with SACAB Membership Standards your bureau will review the accessibility of their services to clients and staff at least annually and this includes checking accessibility for volunteers.



# The fourteen principles of the Scottish CAB Service

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## Effectiveness

Bureaux measure their effectiveness based on how well they meet client's needs. Clients should be helped to clarify their problems and concerns, provided with complete and accurate information, useful advice, and assistance to enable them to carry out the course of action they choose. An effective service depends on efficient management and administration and good use of the most important resource in every bureau: that is its people, including volunteers

## Community accountability

Each bureau is democratically accountable to the community it serves. A bureau's autonomy is qualified only by the conditions it must accept to retain membership of SACAB.

## Client's right to decide

The service recognises that people coming to the bureau have a right to set their own objectives and decide whether to accept the advice and assistance offered to them. The service seeks to avoid making assumptions about its clients' objectives and identifies all the options available to the client and presents these options fairly, so that the client can make a decision without any pressure.

## A voluntary service

The association operates on the principle that first and foremost the Scottish CAB service is a voluntary advice and assistance service, provided by individuals serving their communities in a formal, unpaid capacity. Bureaux employ paid staff to maximize the contribution and effectiveness of their volunteers.

For instance, paid staff might support volunteers during advice sessions or be employed to provide specialist casework in a particular area of advice bringing an additional depth of knowledge which volunteers can access, as well as an additional type of bureau help to which they can refer clients who need it. Together, bureau teams provide a professional, quality service to clients.



A respondent to our 2024 Volunteer Survey summed up their volunteering experience by saying.....

**“Be willing to share your umbrella with others, and hope that they will do the same for you....”**

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# The fourteen principles of the Scottish CAB Service

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## Empowerment

Bureaux seek to assist clients to help themselves: to understand their situations, to decide on a course of action, to take steps themselves to address their problems. Bureaux aim to ensure that every client has the experience and satisfaction of self-help.

## Social policy

The Citizens Advice network in Scotland seeks to use evidence collected from cases and to exercise a responsible influence on the development of social policies and services, both locally and nationally. When gathering such evidence, bureaux will respect the client's right to confidentiality.

## A generalist service

Bureaux provide information, advice and assistance on any topic; no one contacting a Citizens Advice bureau will be turned away because it does not deal with that type of problem. Because bureaux provide a generalist service, they can deal successfully with problems or groups of related problems that do not completely fit within the field of a single, specialist source of help. Some bureaux supplement the generalist service with specialist advice and support for some issues and if a bureau cannot provide the expertise required by a client, they will strive to refer them on to other appropriate services.

## Brand protection

Bureaux have systems and policies in place to ensure the protection of the reputation of the Citizens Advice network in Scotland and the trust in which it is held.

## Fundraising

Bureaux must comply with the Code of Fundraising Practice and with the SACAB Funding Framework which details how to fundraise in alignment with our values and principles.



A respondent to our 2024 Volunteer Survey said.....

**“Volunteering has been a real eye opener to me. It has highlighted how some people are simply unlucky in life and have to deal with issues that arise suddenly.”**

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# Volunteers – at the heart of the Citizens Advice network in Scotland

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**When asked, 94% of respondents to our 2024 Volunteer Survey agreed that they would recommend volunteering at their bureau to others**

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Across the network, bureaux have varying levels of staffing, funding and client demand; they occupy different types of premises in diverse locations from islands to inner-city areas. The community served by each bureau will also have specific demographics and needs. So, while the fundamentals of the advice and assistance service provided will be consistent, it will be organised and delivered differently from bureau to bureau. This means that the volunteering roles available may vary, as may the specifics of activities undertaken in each type of volunteering role. What is consistent is that volunteers are at the heart of the service provided; the differences in the volunteer experience across the network ensure a high-quality service for clients alongside fulfilling volunteer opportunities at every unique bureau.

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## Time for volunteering

For some roles volunteers may be invited to undertake an agreed number of hours per week. In practice, volunteers often do their hours on a regular day or regular days each week. Bureaux will be flexible, although a commitment to regular volunteering enables better planning. It is often easier for a bureau to be more flexible in relation to volunteering which does not involve direct client contact, such as social policy or social media volunteering. If flexibility is key for you, talk to your bureau to find out what will work for you and for them.

As well as time spent volunteering in your role, there may be regular bureau meetings and training sessions that you will be invited to attend, and your bureau may also send out updates or newsletters for you to read. This can be hidden volunteering time; remember to allow for it when considering how much to offer as your regular commitment of time to undertake your volunteering role.

# Volunteers

## – at the heart of the Citizens Advice network in Scotland

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### Time out from volunteering

It is accepted that volunteers will take time away when they need to. This may be for holidays, appointments, illness etc. Your bureau will explain how to let them know when you will not be available for your volunteering, but usually giving them notice that you will not be in if they were expecting you is helpful.

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### Finding the right role for you

Bureaux will discuss the roles available locally with new volunteers during recruitment, induction and training. By making volunteers aware of the different roles, bureaux can ensure that people are matched with the best available role for them as soon as possible. If you are not sure that you have started in the right role, talk to the staff who support volunteers about your concerns and check what other opportunities they may be able to offer.

The following sections describe the types of activities carried out by the main volunteer roles. Since each bureau is slightly different, your bureau may offer other roles, and the information provided here is just a starting point. Remember, volunteers will receive support that is tailored to their role. For volunteers involved in delivering the advice service, support will be available for every advice session. Every bureau works to ensure that their volunteers have what they need to make their role satisfying and enjoyable.

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### Advice volunteers

Volunteer advisers interview clients face-to-face, by phone, by webchat, or video call and let them explain their problems. They then help them to clarify issues by asking questions and exploring the situation. In some bureaux, clients may also be advised by e-mail or messaging.

To find information relevant to a client's enquiry, advisers will consult AdviserNet, the network's comprehensive online information system provided by CAS. They will explain the available options to the client. Clients may then be able to decide what to do, in which case the adviser can support them in deciding on an action plan and provide practical help such as drafting an e-mail or letter if the client needs it.



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**In our 2024 Volunteer Survey 76% of respondents said that the benefits of volunteering in a CAB included learning new skills.**

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## Volunteers

### – at the heart of the Citizens Advice network in Scotland

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If appropriate, and only with the client’s agreement, advisers can contact external organisations on the client’s behalf. This might be by telephone, online, by e-mail or even by letter.

All advisers make a detailed record of each client’s enquiry for quality assurance purposes and so that further help can be offered easily if they return to the bureau again.

In most bureaux, advisers are trained to check that clients are receiving the social security benefits to which they are entitled and to assist clients with benefit applications and other forms if they require.

The Adviser Training Programme must be completed by advice volunteers. The average time it takes to complete this programme is six months. More information can be found under the ‘Volunteering policies and procedures – key information’ section of this handbook.

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### Social policy volunteer

Social policy volunteers ensure that the bureau identifies issues that are cropping up as challenges for clients. This is done by reviewing social policy issues flagged by advisers on the CASTLE client recording system, providing feedback to advisers, and forwarding issues to CAS for national use. Social policy volunteers may sometimes be asked to collate statistics (from CASTLE or otherwise), contribute to local social policy reports and take part in campaigns and activities designed to raise awareness of social policy issues.



A respondent to our 2024 Volunteer Survey said.....

**“We not only assist people but also enable them to find solutions.”**

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# Volunteers

## – at the heart of the Citizens Advice network in Scotland

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### Administration volunteers

Administration volunteers undertake a broad range of tasks essential for the effective running of a busy bureau. This could include receiving clients, covering reception, producing correspondence, handling the post, scanning and attaching documents to the CASTLE client recording system, and answering the telephone.

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### Promotional activities, fundraising and social media

Bureaux may involve willing volunteers in community events and activities designed to raise awareness of bureau services and there may be a specific volunteer role relating to marketing and fundraising activities. Some bureaux have volunteer roles that help with social media activity.

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### Trustees

We have mentioned that each bureau is an independent charity with a board of trustees that is responsible for governance. As a reminder, bureaux may refer to trustees as board members or, if they are a limited company, as directors. Whatever your bureaux calls them, they undertake their role in a voluntary capacity. The board holds legal responsibility for matters such as management of money and other resources, recruitment and employment of staff and, entering into contracts.

Trustees also strive to ensure a good awareness of the bureau and its services in the community, for example through networking and representing the bureau at external meetings. They meet regularly to consider business, set strategy, and make decisions in the interests of the bureau. A typical meeting might include a report on activities and services from the bureau manager, an update on finance and funding from the treasurer and information on recent volunteer recruitment, training and support activities.

In some bureaux, a volunteer attends board meetings as a representative of all the volunteers; they are not trustees and cannot vote but are there to give the board of trustees the volunteers' perspective. In other bureaux, there may be a requirement that one or more of the trustees is drawn from amongst their operational volunteers.

There is additional information on the responsibilities of trustees that your bureau can provide to you, if you ever want to find out more.

### Other volunteering roles

Some bureaux may offer additional volunteering opportunities in IT, research, tutoring and more. Sometimes these may be opportunities for shorter-term volunteering, for example in connection with a particular research or awareness-raising project.

# Volunteers

## – at the heart of the Citizens Advice network in Scotland

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### Volunteer voice and CAS

While you are volunteering, you can also become involved in CAS or the work that CAS does to support bureaux.

CAS sometimes forms working, co-design or consultation groups that might include CAS staff, bureau staff and bureau volunteers. CAS is committed to the co-design process, collaborating with bureaux on specific issues through such groups.

The CAS board must include a certain proportion of ‘bureau trustees’; people who may be trustees or other volunteers in a bureau or paid bureau staff. Also, the CAS board delegates oversight of some specific functions to standing committees that meet about four times per year and report to the board. Staff and volunteers can stand for election to the CAS board and/or the standing committees at any Annual General Meeting of the Scottish Association of Citizens Advice Bureaux.

It is helpful for volunteers to speak with their bureau manager if they are interested in becoming involved in these activities.

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### Moving on

Whilst CAB volunteering roles are usually varied and it is also often possible to swap to another role to try something new, at some stage volunteers will move on or may take a break or retire from volunteering. Bureaux will support their volunteers through these processes.

People often leave volunteering to take up paid employment or educational opportunities. Generally, bureaux are happy to provide references, but it is recommended to discuss this in advance with the staff who support volunteers in your bureau.

Whatever a volunteer’s reasons for leaving, bureaux welcome feedback, especially any suggestions to help improve future volunteer recruitment and support. So, try not to simply fade away; they will appreciate a chat and the opportunity to thank you for your efforts.

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A respondent to our 2024 Volunteer Survey said their volunteering provided the.....



**“Opportunity to learn new skills, work with genuine heroes, understand what life is really like in the community you live in and help people.”**

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# Volunteering policies and procedures – key information

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Every bureau has a set of policies and procedures that guide their approach to aspects of bureau activities and set out operational processes. Your bureau will give you, or ensure you can access, this information; there may be a policy and procedure manual or possibly a series of handbooks or manuals such as advice service manuals, staff handbook, volunteer handbook, and so on.

In this section we cover some of the topics for you to find out about during the initial stages of your volunteering and provide some key information. More detail can be found in your bureau's documentation.

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## Confidentiality

As we have seen, one of the fourteen governing principles of the Citizens Advice network in Scotland is that the service provided is completely confidential.

Volunteers must:

- > never give information about a client or the nature of their enquiry, including the fact of their visit, to anyone not involved in bureau service-delivery, without the client's express permission. This includes bureau trustees/board members. Read your bureau's policy and procedures covering confidentiality for more information. Under safeguarding procedures there are limited circumstances in which client confidentiality may be breached, but the decision to do so is made by designated members of staff; volunteers would not need to make it.
- > use the bureau safeguarding procedure if they consider that someone is at risk of serious harm such that there may be good reason to breach confidentiality. As well as reading the policy and procedure for safeguarding, all staff and volunteers should complete training on safeguarding. A course is available on CASLearn and you should ask about the right stage in your training for you to complete it.
- > appreciate that in signing the volunteer agreement at the start of their volunteer journey, they agree to maintain the aims, values, policies and procedures of their bureau. This includes confidentiality.
- > appreciate that cyber security is important to maintaining confidentiality and that therefore IT and other procedures that have been implemented to ensure adequate cyber security must be adhered to. At the right time in your training your bureau will direct you to a CASLearn course on cyber security and they will ensure that you understand all the relevant procedures.
- > ask their bureau's volunteer support staff or manager if they have any questions or concerns related to confidentiality.

Your bureau will:

- > use their safeguarding procedure to manage any situation where there is an issue about breaching confidentiality and in doing so ensure the burden on volunteers is minimised.
- > deal sensitively with situations involving volunteers and issues of confidentiality.



# Volunteering policies and procedures – key information

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## Protection of your personal data

Your bureau will provide you with a copy of, or electronic access to, their privacy notice covering volunteers. This notice explains how your information will be collected and used by them and what your information rights are, in line with the UK General Data Protection Regulation and the Data Protection Act 2018. It is important that you read this Privacy Notice, together with any other Privacy Notice that may be provided to you on specific occasions when your bureau or CAS is collecting or processing personal information about you.

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## Equality of opportunity

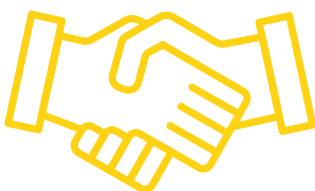
As SACAB, bureaux have collectively adopted the following policy statement on equality of opportunity:

”The Citizens Advice network in Scotland believes that no job applicant, worker, volunteer, or client should receive less favourable treatment than another on grounds of age, disability, gender identity, marital or civil partnership status, pregnancy and maternity, race, religion or belief, sex or sexual orientation. There is no situation in which the CAB service will discriminate unfairly.

**In addition to our moral responsibility, we recognise our obligation under equalities legislation and will work to comply with guidance issued by the Equality and Human Rights Commission.”**

Your bureau will have policies and procedures that cover equal opportunities, equality, diversity, and inclusion in relation to its clients, staff, volunteers and services. All of them will be underpinned by the standard set out by the above network policy statement.

Bureaux recognise the positive value of diversity, promoting equality and fairness, and challenging discrimination. Bureaux also recognise that people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions. Your bureau will encourage and celebrate these differences to make its services as relevant and approachable as they can be.



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**In our 2024 Volunteer Survey 88% of respondents agreed that they felt supported to maintain their competence in their role or to make the right next steps in their volunteering**

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# Volunteering policies and procedures – key information

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## Health and safety

The board of your bureau has legal responsibility for the safety and wellbeing of people in it.

It is a requirement of their membership of the Scottish Association of Citizens Advice Bureaux that a bureau will have policies and procedures covering all aspects of health and safety and sufficient insurance cover. Your bureau should have insurance to protect you when you are volunteering.

Your bureau will also ensure that you are informed about key health and safety matters related to you and your role during your induction and training process.

Volunteers must:

- > acquaint themselves with (and ensure that they understand) the key health and safety information they are given, including the location of fire exits and equipment, what the fire evacuation procedure is, how to get help if they or a client they are with has an accident or is taken ill, and the location of the bureau accident book.
- > always observe all safety rules.
- > find out who to inform of any accidents, incidents or unsafe practices they notice when volunteering and do not hesitate to do so.
- > ensure that if they are involved in an accident during their volunteering, it is recorded in the bureau accident book.

Your bureau will:

- > provide a safe environment.
- > provide a first aid kit.
- > display fire response and evacuation information.
- > ensure that staff and volunteers have the health and safety information they need including information on their health and safety responsibilities.



A respondent to our 2024 Volunteer Survey said their CAB volunteering .....

**“has been incredible in improving my confidence for future employment and I love working with the team and helping others.”**



A respondent to our 2024 Volunteer Survey said.....

**“I feel valued and respected in my role. I am continually learning and never without support and advice.”**

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# Volunteering policies and procedures – key information

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## Training

Bureau volunteers receive initial and ongoing training to ensure they are equipped with the knowledge and skills required for their role.

Training will include an induction to ensure your orientation to the training process, the Citizens Advice network in Scotland and your bureau. If your training is being undertaken by your bureau then this may be covered during the early stages of that training. If you undergo initial training as part of a national or regional project, outside your bureau, then expect to receive an induction during that training but also a process of orientation to your bureau when you start to volunteer there.

Across Scotland, bureau trainees register on the CASlearn website to access online training courses. CAS supplies and maintains CASlearn and the training on it. It is a resource used by both volunteers and paid bureau staff. Your bureau will provide you with log-in information and initial support to use CASlearn and they will also let you know which courses you need to do to get ready for your volunteer role. There are opportunities to provide feedback to CAS about your experience of the training provided on CASlearn; this is done electronically on the CASlearn website itself.

As stated under the information about the role, new volunteer advisers must complete the Adviser Training Programme (ATP), which is a blended programme of online learning materials available on CASlearn, face-to-face training sessions provided in the bureau or via video conferencing, and bureau practice. If you are training to be an adviser, your bureau will explain more about the ATP and discuss your training schedule with you.

If you require support with your training, initially speak with your bureau. The CAS Learning and Standards Team, who support bureaux with training and who are responsible for CASlearn, will also help you if needed.



# Volunteering policies and procedures – key information

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## Support and supervision

As you progress with your volunteering, you will find that support comes in many forms and from various sources.

- > Your bureau will tell you who you should approach for support with or discussion about your training and development, or other aspects of your volunteering commitment. This is likely to be a staff member whose role includes volunteer support. Depending on the size of the bureau this might be the manager, another member of the management team, a trainer, or a volunteer support worker. This person will ensure that you have an effective induction and everything you need to complete your training.
- > The same, or another person, will be responsible for regular volunteer support once your initial training is complete. This will include feedback and regular supervision sessions that cover your progress, training and what, if any, development opportunities interest you.
- > Your bureau will explain who you should speak with for support when carrying out your volunteering tasks during volunteering shifts. For example, if you are an adviser then there will be a person on duty to provide support to you and other advisers during every advice session. If you are an administrator, it may be that your day-to-day support is provided by an office administrator or another member of the team.
- > For some of your training, you may be assigned a mentor who will often be an experienced volunteer. You may have a different mentor for each session, or you may have the same mentor every week. If you are training to be an adviser, your mentor will support you in the bureau practice that forms part of the ATP.
- > Other staff and volunteers will also be a source of help and support whether that is finding your way around, help to use equipment, input on a client query, or simply a friendly chat.
- > You can contribute to a rewarding volunteer experience for yourself and others by taking advantage of opportunities to let your bureau know how things are for volunteers in your role: during one-to-one support sessions, at staff or volunteer meetings, or in an informal chat with the manager or volunteer support staff.
- > CAS supports your bureau to support you and provides opportunities for ongoing training, opportunities for you to meet people from other bureaux in online fora, online and occasional in-person training sessions, workshops and meetings. CAS also produces a weekly newsletter for bureau staff and volunteers, you can sign up to receive this from [a page on the CAS website here](#). Again, you will need to be signed into the website to access this page, your bureau can supply you with the username and password you should use.



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A respondent to our 2024 Volunteer Survey said.....

**“It has been very rewarding to work with and help people in difficult situations.”**

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# Volunteering policies and procedures – key information

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## Problem solving

Bureaux strive to ensure that their volunteers have a positive experience but if issues do arise for a volunteer, or related to a volunteer's performance, conduct or ability to carry out their role, there will be a process to help everyone manage the situation. This may be called the Volunteer Problem Solving Procedure. Ask your bureau if you would like to learn more about it.

Should you encounter a challenging situation as a volunteer you can raise it informally with the staff member who supervises volunteers at your bureau or, if your concern relates to that person, with their manager. However, it would be worth checking your bureau's process and what the more formal stages of that process are. If you do this early in your volunteering journey, you can ask for clarification of anything in it that you are unsure about during training or induction sessions.

You should also be aware of the process where there are more serious concerns about a volunteer's behaviour. Seriously concerning behaviour includes, but is not limited to, breaching confidentiality, falsification of documents, harassment, theft, fraud, violence, and damage to bureau property. If allegations of a serious nature against a volunteer are upheld, then usually their volunteering will be ended immediately. Again, check your bureau's procedures.

Across the Citizens Advice network in Scotland, people are encouraged to speak up if they experience or see something that seems to be wrong.

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## Volunteer expenses

Offering reimbursement of out-of-pocket costs reflects the principle that the Citizens Advice network in Scotland is primarily a voluntary service and is underpinned by the networks' policy statement on our commitment to equality of opportunity. Finances should never be a deterrent to becoming a volunteer.

Your bureau will have a policy and procedure(s) covering payment of volunteer expenses and during your induction, your bureau should explain what expenses you can claim and how you do so. As a minimum, your bureau will generally cover reimbursement of reasonable out-of-pocket expenses incurred through volunteering, including costs of travel to and from your volunteering and travel to related training and meetings. Travel costs will usually be reimbursed subject to rates set by the bureau board, e.g. a set mileage rate for travel by car.

Check your bureau's approach to reimbursing other costs. For example, the costs of caring for dependants incurred because of your volunteering or, if you use your own vehicle to carry out volunteering duties other than travel to or from the place where you volunteer, the cost of any additional premium incurred for the 'business use' of your vehicle.

If you are in receipt of income-based benefits, then receipt of reasonable out-of-pocket expenses associated with your volunteering would not usually affect your benefits although you may wish to retain receipts as evidence of your costs and seek advice about how the rules apply in your particular circumstances.

## Volunteering policies and procedures – key information

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### Mistakes and financial liability

Volunteers in bureau sometimes worry about the implications of making a mistake. Tell the person supervising you at the time if you think you have made a mistake, whether in advice provided to a client or in relation to administration, in case confidentiality may also have been breached, or anything else. The same applies if you notice a mistake that someone else has made.

Every bureau has insurance policies in place that mitigate the risks of providing the service, including professional indemnity insurance. When a mistake is made, the bureau's main concern will be to manage any impact on the client/clients and to learn from the situation. The bureau will want to do this as soon as possible so make them aware right away.

Remember, you are never alone as a bureau volunteer, if you are worried ask for help.



A respondent to our 2024 Volunteer Survey said.....

**“Some days I ask myself why I am doing this as it is so difficult and challenging. Other times, I can make such a difference to a person’s life, that it stops me from giving up!”**

# Next steps

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This handbook should have provided you with an understanding of what the Citizens Advice network in Scotland is, and an initial framework of information about volunteering in a bureau. You should also read the specific policies, procedures, guidelines and other documents your bureau has in place for their volunteers and attend any induction sessions they offer. If there is anything that you are unsure about at any stage, your bureau colleagues will be happy to talk you through it; there are no foolish questions!

We hope that you have an exciting and worthwhile volunteer experience with your bureau and that you enjoy being part of our network. Thank you for offering your time to the essential services we provide and, finally, welcome.



A respondent to our 2024 Volunteer Survey said.....

**“You are never alone.”**





A respondent to our 2024  
Volunteer Survey said.....

**“It’s satisfying  
when you’ve  
made a positive  
difference to  
someone’s life  
even if it is  
just giving a  
sympathetic ear ”**



If you have any queries about this handbook, please contact the CAS Volunteer Development Team or the CAS Communications Team.

[www.cas.org.uk](http://www.cas.org.uk)



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