

Job Title: Energy and Benefits Adviser

Accountable to: Bureau Manager

Hours: 28 per week

Salary: £29,000 pa pro rata (£23,200) plus employer's pension contribution.

Contract: Fixed term to 31 March 2026, continuation subject to funding



Job Summary

The postholder will provide specialist information, advice and support to people in Midlothian in or who are facing financial hardship, with a focus on addressing issues with benefits and maximising home energy efficiency and cost-saving.

Job description

Key responsibilities

1. Engaging with clients by phone, email and face to face (at the Bureau or in community locations) to identify and support them in addressing issues related to benefits and home energy. This may include form-filling, advocating on their behalf with external agencies and/or challenging benefit decisions.
2. Providing information and advice to improve energy efficiency and reduce home energy costs and referring clients to schemes that are appropriate to their needs and circumstances (e.g. Warm Home Discount, insulation, boiler replacement, etc.) and/or to external sources of support (e.g. Home Energy Scotland, Scottish Welfare Fund, etc.)
3. Enabling clients to maximise available income through benefit checking and assistance with applying for grants, refunds, settlements, emergency home fuel payments and other funds to which they are entitled.
4. Helping clients develop skills, knowledge and confidence for managing their finances more effectively and self-advocating when engaging with other agencies.
5. Receiving referrals from other agencies and, where appropriate, referring clients to specialist services, either within the CAB or externally.

- 6.** Entering client data on the CASTLE case management system promptly and accurately.
- 7.** Maintaining an ongoing caseload and ensuring comprehensive case records using the CASTLE case management system, always ensuring compliance Scottish National Standards for Information and Advice Providers and Citizens Advice Scotland's membership requirements.
- 8.** Ensuring all information is processed in line with bureau policies including Confidentiality, Data Protection, Equality and Diversity and Quality Assurance.
- 9.** Advising and supporting CAB colleagues on case issues within the postholder's area of expertise and to support their learning and development.
- 10.** Representing Dalkeith CAB at meetings, events and networks where appropriate, and similar duties.
- 11.** Building the capacity of other local helping services through the provision of information, via presentations and through designing and delivering relevant learning opportunities.
- 12.** Managing own administration, case work, diary and time effectively.
- 13.** Producing reports from work activities for monitoring or other relevant purposes.
- 14.** Identifying examples of the negative impact of policies or processes on clients and providing anonymised details to the CAB manager and Citizens Advice Scotland social policy contact to raise awareness of issues and campaign for improvements.
- 15.** Working at all times within the policies and procedures of Dalkeith CAB including those related to service planning, delivery and evaluation, Equality and Diversity, Lone working, Health and Safety, Confidentiality and Data Protection.
- 16.** Updating own understanding of benefits, entitlements, legislation and other relevant information through support from the manager, relevant training and self-directed learning.
- 17.** Engaging in sessions for support and supervision with the manager.
- 18.** Undertaking any other duties consistent with the purpose of the post and capabilities of the postholder by agreement with the Manager.

Person specification

	Essential	Desirable
Experience	<ol style="list-style-type: none"> 1. Demonstrable experience (paid or unpaid) of providing advice and information services. 2. Experience of managing a caseload, including for clients experiencing complex issues. 3. Experience of providing information and support to empower and build the confidence of people who face disadvantage. 4. Self-motivated, with experience of organising and prioritising a busy, complex workload, under pressure, using own initiative while also contributing effectively to a team. 	<ol style="list-style-type: none"> A. Relevant qualification related to advice, benefits, debt, energy or similar. B. Experience of producing reports for funders, managers and other audiences.
Skills	<ol style="list-style-type: none"> 5. Clear verbal communication skills (e.g. for engaging sensitively with clients, advocating for clients with external agencies and contributing to the CAB team.) 6. Effective written communication skills (e.g. for work planning, case recording, monitoring and evaluation, correspondence and report writing.) 7. Ability to complete and support individuals in completing funding applications. 8. Confidence in using IT and telephony systems (e.g. case recording, form-filling, report-writing, engaging with agencies, email, diary management, etc.) 	<ol style="list-style-type: none"> C. Willingness to progress in the role and develop skills to a higher level.

<p>Knowledge</p>	<p>9. Up to date understanding of the UK and Scottish benefits systems.</p> <p>10. Understanding of measures and schemes for increasing home energy efficiency, managing energy costs, addressing fuel debt and reducing the risks of fuel poverty.</p> <p>11. Awareness of local voluntary and statutory services for client signposting and referrals.</p>	<p>D. Knowledge of the local area and relevant helping agencies and services.</p> <p>E. Experience of using the CASTLE case management system, or similar.</p>
<p>Other factors</p>	<p>12. Commitment to the aims and policies of Dalkeith Citizens Advice Bureau and to working within a client driven, volunteer-led community advice and information service.</p> <p>13. Willingness to work outside normal office hours on occasion, and travel locally and occasionally nationally in the course of duties.</p> <p>14. Willingness to undertake a basic disclosure check through Disclosure Scotland.</p>	<p>F. Full driving license and use of a vehicle</p>