

Job Title: Investing in Communities Project Lead

Accountable to: Bureau Manager

Hours: 35 per week

Salary: £34,000 pa plus employer's pension contribution.

Contract: to March 2026, with continuation subject to funding.



Job Summary

Investing in Communities is a Scottish Government funded joint initiative of Midlothian Voluntary Action, Volunteer Midlothian and Dalkeith Citizens Advice Bureau that aims to improve the health, wellbeing and resilience of people in the Central Dalkeith and Woodburn areas through information, advice, learning and practical action.

This is an area with wards that feature in the top 10% on the Scottish Indices of Multiple Deprivation (SIMD) and communities especially hard hit by the legacy of the Covid pandemic and ongoing cost of living crisis.

The postholder is responsible for collaborating with partner organisations to develop, deliver and evaluate actions to achieve project aims. In particular, this includes advice and information provision for those in or at risk of financial hardship and building skills and knowledge of local people so they can make informed life and financial decisions.

Key responsibilities

- 1.** Liaising with colleagues at Midlothian Voluntary Action (MVA) and Volunteer Midlothian on project planning, delivery, evaluation and reporting and addressing any issues or concerns swiftly and professionally.
- 2.** Organising and providing general advice and information services in local community settings to help clients reduce their risk of financial hardship including related to benefits, employment, debt, housing council tax and home energy costs.
- 3.** Helping clients develop skills, knowledge and confidence for managing their finances more effectively and self-advocating when engaging with other agencies.
- 4.** Receiving referrals from other agencies and, where appropriate, referring clients to specialist services, either within the CAB or externally.
- 5.** Entering client data on the CASTLE case management system promptly and accurately.

- 6.** Ensuring all information is processed in line with bureau policies including Confidentiality, Data Protection, Equality and Diversity and Quality Assurance.
- 7.** Advising and supporting CAB colleagues on case issues within the postholder's area of expertise and to support their learning and development.
- 8.** Representing Dalkeith CAB at meetings, events and networks where appropriate, and similar duties, deputising in the Manager's absence.
- 9.** Building the capacity of other local helping services through the provision of information, via presentations and through designing and delivering relevant learning opportunities.
- 10.** Managing own administration, case work, diary and time effectively.
- 11.** Producing reports from work activities for monitoring or other relevant purposes.
- 12.** Identifying examples of the negative impact of policies or processes on clients and providing anonymised details to the CAB manager and Citizens Advice Scotland policy contact to raise awareness of issues and campaign for improvements.
- 13.** 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.
- 14.** Updating own understanding of benefits, entitlements, legislation and other relevant information through support from the manager, relevant training and self-directed learning.
- 15.** Engaging in sessions for support and supervision with the manager.
- 16.** 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, employment 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, negotiating with external agencies and contributing to meetings.) 6. Effective written communication skills (e.g. for work planning, case recording, form-filling, reporting, monitoring and evaluation and correspondence. 7. Ability to work independently using own initiative and contribute effectively to a team working across multiple sites. 8. Confidence in using IT and telephony systems (e.g. case recording, online research, 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.

Knowledge	<p>9. Up to date understanding of the UK and Scottish benefits systems, especially related to health and disability. Knowledge of debt, employment and housing also desirable.</p> <p>10. Awareness of helping services available for the signposting and referral of clients.</p>	<p>D. Understanding of processes for managing issues with debt, housing and employment.</p> <p>E. Experience of using the CASTLE case management system, or similar.</p>
Other factors	<p>11. City and Guilds Level 3 Energy Awareness Award, or willingness to work towards this as part of the role.</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>