



**Staffordshire
South West**

Energy Advice Caseworker

Job Pack



Job pack

Thanks for your interest in working at Citizens Advice Staffordshire South West. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

A message from our Chief Executive:

The work we do here at Citizens Advice Staffordshire South West can make a huge difference to clients seeking help and advice.

If you are passionate about supporting individuals and families in need and interested in joining a dedicated, professional team we would love to hear from you.



Claire Davis

Chief Executive Officer

Want to chat about this role?

If you want to chat about the role further, you can contact Tracey Argent by emailing tracey.argent@citizensadvicessw.org.uk or calling 07889 573803

Our values

We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

3 things you should know about us

1. We're local and we're national. We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.

2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

What it's like to work here

As a charity, our community-based service has always strived to help anyone who needs it. We are well known, well established and a well-respected organisation that has grown and diversified over 80 years.

Citizens Advice Staffordshire South West has 85 volunteers and staff who work with over 10,000 people to address more than 30,000 issues every year, providing free, independent, impartial and high quality advice. Our service gives people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.

We provide advice services across the districts of Stafford Borough, Cannock Chase and South Staffordshire. We work in a blended way with a mix of home and office working. We care about our employees' mental wellbeing and ensure everyone can achieve a healthy, happy work-life balance.

We are committed to developing our staff and we work with our staff to support them with their personal and career development. We have a commitment to a culture of learning and work together to problem solve and share learning experiences.

We value diversity, promote equality and challenge discrimination wherever we find it, and through our research and campaign work, we speak up on the issues that affect people's lives.

You will be joining a dedicated, vibrant and talented team of people who are deeply passionate about services which improve people's lives.



The role

Reporting to: Contracts and Partnership Manager

Annual Gross Salary: £23,500 per year

Location: A mix of office, outreach and home based working across the districts of Stafford Borough, Cannock Chase and South Staffs.

Contract: Fixed Term until March 2026 with possibility of an extension.

Hours: 37 hours a week over 5 days Contracted hours are distributed across the week to enable some flexibility. Core hours 9:30am - 3pm.

Holidays: 35 days per year including bank holidays

Pension: Opportunity to be enrolled in the workplace pension scheme, subject to meeting auto-enrolment criteria.

Other benefits: Regular training opportunities, full support to carry out your role, opportunities for career progression.

The Role: This post is funded by the Cadent Foundation. The Energy Caseworker will be experienced in delivering casework, with a focus on using a person-centred approach to help clients with multiple needs.

The Energy Caseworker will be delivering specialist energy advice and income maximisation support to clients experiencing fuel poverty and provide support to clients who have complex needs or circumstances.

The caseworker will look at individuals' circumstances holistically and ensure clients can access the range of services they need to tackle fuel poverty and financial hardship for the long term.

This includes energy advice, income maximisation via a full benefit check, debt, comprehensive energy efficiency awareness and support with any other needs the client identifies.

The Energy Caseworker will need to be skilled in case recording, identifying and accurately recording client needs, be able to respond and keep the client aware of the support being provided to them.

All Energy Caseworkers will need to complete Generalist Adviser training and NEA Level 3 Energy Awareness qualification.



Role profile

Advice Work

1. To interview clients, on the telephone, providing appropriate advice and information, exploring options and implications to help clients set priorities and make decisions.
2. Providing advice on energy efficiency measures and behavioural change.
3. Providing financial assistance to be spent towards energy bills, including fuel vouchers.
4. Have understanding of tariffs, bills and fuel options including switching methods,
5. Advising about Smart Meters, Advice on PSR, WHD,
6. Support to access and apply for grants to reduce energy costs and/or fuel debt such as local hardship funds, supplier funds, Support to access energy efficiency grants, and any local schemes for white goods, boiler upgrades etc.
7. Supported with income maximisation through a benefit entitlement check, financial capability support,

8. Provide information and advice to empower clients to act on their own behalf, including signposting to other agencies where appropriate.
9. Explore options and implications to enable the client to make informed decisions.
10. Provide full casework to the client, identifying the client's needs and supporting through to its resolution and where needed refer clients on for issues of debt, housing or benefits.
11. Provide the casework through channels of face to face, telephone and digital.
12. To maintain clear and accurate case records that meet the quality standards of the Membership Scheme. To maintain records as required for continuity of casework, information retrieval, statistical monitoring, accountability and report preparation.
13. To seek support as necessary to ensure quality of advice, good practice and that the degree of casework taken on is appropriate.
14. To liaise with suppliers, statutory and voluntary organisations as required.

Training and Professional Development

1. Keep informed of new and changing legislation relevant to the post and of local issues/policies.
2. Read the regular Citizens Advice updates and information items.
3. To attend and successfully complete NEA Level 3 Energy Awareness qualification.
4. Attend learning events and carry out learning activities in line with Continuing Professional Development requirements.
5. Keep up to date with legislation, case law, policies and procedures relating to debt advice, and attend appropriate training; including reading relevant publications.
6. To identify and develop your own learning opportunities.

7. Participate constructively in team meetings, engaging with team members, sharing knowledge and good practice and supporting each other to problem solve.

Social Policy

1. Recognise the root causes of problems and contribute social policy evidence in line with the twin aims of the Citizens Advice service, highlighting issues of concern to disadvantaged groups and clients in general.
2. Participate in local and regional social policy initiatives.

Administration

1. Ensure that the client profile information, advice issue codes and information sources are accurately recorded
2. Be responsible for your own case management.

Quality

1. Continually meet the requirements of the project's Quality Framework and engage with Quality supervision and support services
2. Meet the Key Performance indicators and quality criteria relevant to the project.

Equity and Diversity

1. Ensure that work undertaken reflects and supports the service's Equity and Diversity Strategy

IT Proficiency

1. Develop and maintain Information Technology proficiency to support your work requirements

Other

1. Comply with all the organisation's published policies and procedures, with attention to Health and Safety, Safeguarding, Confidentiality, GDPR and Data Protection, Home Working policies and Equity and Diversity.

2. Uphold the aims and principles of the organisation Undertake any other duties as might be reasonably required within the scope of the role..
3. To attend meetings within CASSW and external as required .
4. In addition to the above tasks and duties, the post holder will be required to undertake such other tasks and duties identified as being generally compatible with the post and the aims of CASSW.



Person specification

Essential Skills and qualities

Experience of providing energy advice and have completed the modules within the energy training programme
Complete NEA level 3 Energy Awareness

Trained in generalist advice and have a broad understanding of advice area

Ability to check benefits awards and perform calculations, identifying entitlement to benefits, additional elements, premiums, rates and backdated payments

Ability to explore and identify ways to maximise income

Experience of working in a target driven environment is essential.

Effective oral communication skills with particular emphasis on negotiating and representing

Effective writing skills with particular emphasis on negotiating, representing and preparing reviews, reports and correspondence

Ordered approach to casework and an ability and willingness to follow and develop agreed procedures

Understand the issues involved in interviewing clients

Ability to prioritise own work, meet deadlines and manage caseload

Ability to use IT in the provision of advice

Ability and willingness to work as part of a team

Ability to monitor and maintain own standards

Understanding of and commitment to the aims and principles of the Citizens Advice service and its equality and diversity policies

Desirable Criteria

Experience of working in the voluntary sector would be desirable

Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively

Demonstrate understanding of social trends and their implications for clients and service provision

Have access to a vehicle and be willing to travel

Reasonable adjustments

Application Stage: applicants are encouraged to let us know if they require any reasonable adjustments to support them in the application process.

Interview Stage:

Candidates will be asked about any reasonable adjustment that they might require during the interview process. This may include, for example, written version of interview questions, use of specialist software or additional time to complete an exercise, use of a sign language interpreter if a candidate is deaf.

On Appointment:

Any necessary workplace adjustments you may require will be discussed and agreed if appropriate and will be put in place to support you in your new role.

Disclosure and Barring Service Checks (DBS)

Some Citizens Advice positions may require the successful candidate to undergo a DBS check, this will be specified within the job pack

Criminal Convictions

Anyone who applies to work within Citizens Advice will be asked to disclose details of unspent convictions during the recruitment process. Having a criminal record will not necessarily bar you from working for Citizens Advice – much will depend on the type of job you have applied for and the background and circumstances of your offence. However, our national policy is that we will not take on anyone with a conviction for a sexual offence against a child vulnerable adult, regardless of when the offence took place.

To take up this post you must have the right to work in the UK. Please note that Citizens Advice Staffordshire South West does not hold a sponsor licence and, therefore, cannot issue certificates of sponsorship under the points-based system.

How to apply:

Closing Date: 12 noon 12th September 2025

Interview date: week commencing 22nd September 2025

Apply here: send your CV with a covering letter to

recruitment@citizensadvicessw.org.uk

Or post to Jane Adams

Citizens Advice Staffordshire South West

1a & 1b St Mary's Place,

Stafford,

ST16 2AR

In accordance with Citizens Advice national policy, we may require the successful candidate to be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.