



Job Title:	Lead Energy Advisor
Salary:	£31,537 - £33,699
Location:	Croydon (Hybrid Working)
Fixed term:	31 March 2028
Hours:	35 hours
Reporting to:	Community Advice Manager
Closing Date:	5pm 9 October 2026
Return Address:	ceo@croydoncab.org.uk
Interview Date:	23 October 2026

Main Purpose and Scope of Role

The postholder will provide a high-quality advice service to clients face to face, by telephone and by email. This project is for clients who are experiencing problems with their energy supply or supplier. As well as providing energy related advice, the postholder will also advise on Income Maximization.

This role would suit applicants with:

- Recent experience (at least 12 months' experience within the last 3 years) of delivering excellent energy and income maximization advice
- Experience of achieving performance and quality targets/KPIs.
- An ability to work independently and collaboratively as part of a team.
- Experience of managing challenging situations.



Role Description

Key Responsibilities:

- To provide specialist advice and casework covering energy related matters and income maximization, as well as generalist advice on other enquiry areas
- Delivery of services through a range of channels, including face to face, telephone, e-mail, and referrals from local community and voluntary agencies
- Engagement with key stakeholders, in particular community outreach locations

Areas of Responsibility:

Service Delivery

- Provide a specialist energy advice service to include:
 - Generalist advice on income maximisation and other enquiry areas
 - Interviewing clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s)
 - Identify key information about the problem presented including time limits, key dates and requirements for urgent advice or action
 - Use Citizens Advice and approved local resources to find, interpret and communicate relevant information to clients
 - Assess and agree the appropriate level of service, taking into consideration the client's ability to take the next step themselves, the complexity of the problem and the organisation's resources
 - Possess a clear understanding of Citizens Advice's information assurance and confidentiality policies and how they relate to the recording and storage of clients' data
 - Refer clients appropriately (both internally and externally) to suit clients' needs, following agreed protocols, including making arrangements and informing clients of what to expect
 - Use IT software for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production
- Actively empower and support clients where appropriate so that they are able to better manage problems in the future
- Collect and record all relevant information onto the organisation's CRM (Casebook)
- Analyse and interpret complex information, communicating this effectively in writing

Performance Targets and Quality Standards

- Ensure work meets the quality standards of:
 - the Citizens Advice Quality Assurance Assessment Scheme
 - the Advice Quality Standard (AQS) Advice with Casework as appropriate
- Complying with systems for monitoring and reporting purposes.

- Maintaining standards of service delivery and ensuring that advice and casework conforms to the Citizens Advice membership requirements, the Advice Quality Standard
- Ensure funder client targets and KPI's are met or exceeded, including:
 - meeting or exceeding target numbers of clients
 - recording of all appropriate outcomes and client profile data required by funders
- Provide reports for managers as required.

Liaison and Communication

- Working collaboratively with colleagues to ensure that the service area meets key performance indicators and targets.
- Maintain professional relationships with local agencies in order to further good quality of advice and research & campaigns work.
- Attending meetings with statutory and voluntary agencies as required to keep in touch with local issues and developments
- Prepare case studies and participate in the preparation of reports for funding bids/monitoring and evaluation reports
- Develop and deliver energy advice workshops within the local community
- Attend relevant internal and external meetings as agreed with the line manager.

Research and Campaigns:

- To take an active role in the Research and Campaigns process by:
 - Forwarding all examples of R&C work to the relevant parties
 - Contributing to local and national R&C campaigns

Administration

- Be self-administering (client letters, documents, reports) complying with current practices, policies and procedures detailed in the Office Manual

Policies and Procedures

- **Equality and Diversity:**
 - the post holder must always have due regard in the planning and execution of their duties to the Citizens Advice Equality and Diversity Policy
- **Aims and Principles of the Citizens Advice Service:**
 - at all times, promote the aims, principles, policies, interests, and wellbeing of the organisation and to protect its integrity and reputation

➤ **Health and Safety:**

- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
- To notify immediately the line manager of any issues that may detrimentally affect the health and safety of staff, volunteers, clients, and visitors to CAC

Professional Development and Training

- Maintain an up to date working knowledge of all new relevant legislation through reading relevant case law and appropriate professional journals and publications
- Self-identify own development needs undertake appropriate training as necessary to maintain and develop competence across advice areas
- Prepare for and attend supervision sessions.

Other duties and responsibilities

- A job description does not constitute a “term and condition of employment”. It is provided only as a guide to assist the employee in the performance of their job and is not included to be an inflexible list of tasks
- CAC needs to be a flexible organisation, capable of adapting quickly to changes in funding, client demand and channel preference. Therefore, employee’s duties may be varied from time to time and the post holder accepts that they may be asked to undertake any other work or duties as may reasonably be required within the scope of and commensurate to the nature of the post, as and when required.



Person Specification

Essential

1. At least one year's experience of knowledge and experience of generalist and specialist energy issues
2. Recent experience of providing advice to the Advice Quality Standard
3. An understanding of the problems and issues associated with energy supply/suppliers and the implications for clients and advice service provision
4. Experience of achieving performance and quality targets/KPIs.
5. Awareness of, and ability to, understand and empathise with clients from a diverse range of backgrounds and disadvantaged groups living in the community
6. A good up to date understanding of equality and diversity and its application to the provision of advice
7. Ability to remain non judgemental
8. Ability to understand the advice model and to provide outstanding customer service
9. Ability to work as part of a team as well as independently, and to be open to receiving feedback and learning for others
10. Excellent communication and interpersonal skills, including the ability to communicate effectively with clients, third parties and colleagues at all levels
11. Ability to manage own time and meet deadlines
12. Excellent ICT skills and the ability to use multiple ICT platforms and packages
13. A flexible approach to service delivery and the ability to adapt to changing client needs, and funder demands
14. An understanding of and commitment to the Aims, Principles, and equality policies of the Citizens Advice Service
15. A commitment to continuous professional development, including a willingness to maintain standards, develop and maintain knowledge across advice topics
16. The ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.

Desirable

17. Completed all Citizens Advice Energy training or the NEA Level 3 City and Guilds Level Energy Awareness
18. Experience of delivering casework in welfare benefits, housing or debt
19. Experience of delivering high quality advice against funder targets, ensuring the collection of evidence and data to support funders monitoring and reporting requirements
20. Experience of completing reports
21. Experience of delivering group talks/workshops

22. Experience of providing support and supervision

How to apply

Applications should consist of:

- A completed application form [here](#). (CVs will not be considered).
- A diversity monitoring form completed online [here](#).

Completed applications should be emailed to: ceo@croydoncab.org.uk no later than

The application timeline

Applications open: 08 September 2026

Applications close: 09 October 2026

Shortlisting held: week commencing 12 October 2026

Interviews held: 23 October 2026

Start date: ASAP

Please note that interviews may take place over Microsoft Teams