

Northumberland County Council  
**JOB DESCRIPTION**

Post Title: Warmer Homes Case officer		Director/Service/Sector: Climate Change		Office Use
Band: 4		Workplace: County Hall Morpeth or other base as agreed		JE ref: 4285
Responsible to: Warmer Homes processing Team leader		Date: March 2023	Job Family:	
Job Purpose: The Warmer Homes case officer will manage a caseload and give support to the Warmer Homes team within Climate Change department in the delivery of the Warmer Homes scheme and other energy efficiency initiatives including Government funded energy efficiency grant schemes such as HUG, Green homes grants, ECO, Local Authority Flexible eligibility and other grants that may be available. The overall purpose of the post will be to manage a caseload and advise residents on how to access the various funding schemes that are available for home energy efficiency measures. The purpose of the Warmer Homes scheme is to ensure that Northumberland residents, including those who may have low incomes, are fuel poor, have disabilities, poor health or are vulnerable in other ways and/or those who live in properties that have poor energy performance ratings or are hard to heat are assisted to access domestic retrofit solutions to improve energy efficiency, make homes warmer and lower their carbon usage.				
Resources	Staff	Not applicable – may involve training staff bank staff		
	Finance	Contributing to the efficient and effective running of the Council's domestic retrofit programme, projects and service; invoice processing and ordering		
	Physical	Maintain and operate key programme and project systems. Expected to frequently work away from the normal office location and will regularly deal with residents in their homes.		
	Clients	Ensure compliance with relevant legislation, council policies and procedures.		
1. Duties and key result areas:				
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<div>1. Provide appropriate, and customised information and advice to residents and landlords who wish to improve the energy efficiency of their homes.</div> <div>2. Liaise with building owners, Retrofit Coordinators, Retrofit Assessors, Retrofit Designers, Retrofit Installers and Building Surveyors, where appropriate, to support delivery</div> <div>3. To provide administrative support to the Climate Change and retrofit Teams in respect of Warmer homes and other Sustainable Warmth initiatives including obtaining evidence and checking eligibility, processing invoices, records, budget monitoring.</div> <div>4. To liaise with key stakeholders to promote, market and increase awareness of Warmer homes and other energy efficiency initiatives including developing referral mechanisms.</div> <div>5. Manage a caseload of customers to offer advice and assistance on Energy Efficiency schemes across Northumberland to improve the energy efficiency of homes and to help combat fuel poverty.</div> <div>6. Helping to ensure that the terms and conditions of the Warmer homes Northumberland project are met within the deadlines and that local authority policy and procedures are adhered to.</div> <div>6. Act as the point of contact for Warmer homes to establish customer needs and advise on the range of services that the Climate Change team, other Northumberland County council services and other agencies can provide about energy efficiency and fuel poverty. To give advice by telephone, video and face to face advice as appropriate. Visit customers in their own homes when required, carrying out holistic home surveys to identify energy efficiency measures required, organising measures and works to improve homes and lower fuel bills.</div> <div>7. Identify and administer applications for financial assistance that may be available primarily Sustainable Warmth but also may include local authority discretionary grants, ECO/ ECO LA flex, and other funding that may be available locally and nationally for additional energy efficiency measures. Making consensual referrals to internal and external agencies.</div> <div>8. Administering referrals for energy efficiency, creating and updating records on case manager and relevant software including Excel spreadsheets/ Sharepoint, assessing gathering evidence required to assess eligibility.</div>				

9. Allocating jobs to retrofit team or, in liaison with the retrofit team, to contractors and in consultation with other officers, preparing appropriate paperwork for grant approval, processing job sheets and invoices and following general office procedures for the supply of goods.
10. Ensure accurate and up to date records are kept enabling applications to be monitored and performance measured and accurately recording outcomes particularly for the monitoring requirements for Warmer Homes schemes.
11. Participate in training and staff development opportunities and keep up to date with new legislation and policy through attendance at training courses, blended learning, etc.
12. Assist with the delivery of the Climate change Business Plan and ensure that services are customer focussed, delivered efficiently and comply with policy or strategy requirements.
13. Develop referral mechanisms for vulnerable people to access the service and to promote the service including assisting with the preparation and delivery of a range of publicity special campaigns and events when required and directed.
13. Working collaboratively with key delivery partners to build professional relationships with stake-holders including landlords, installers and key stakeholders to raise awareness, gain support and encourage referrals into the energy efficiency and fuel poverty schemes. Develop referral mechanisms for vulnerable people to access the service and to promote the service including assisting with the preparation and delivery of a range of publicity special campaigns and events when required and directed..
14. Ensure that Information Sharing Agreements and Protocol with relevant parties including handling client personal data in compliance with local GDPR policies and legislation.
15. Adhere to risk assessments and health and safety policies and ensure that in the course of their work they adhere to Safeguarding policies, Risk management, Health & Safety and other legal and statutory requirements along with best practice and general duty of care.
17. Attend and contribute to relevant committees, meetings and seminars and participate in task groups as required.

The duties and responsibilities highlighted in this Job Description are indicative and may vary over time. Post holders are expected to undertake other duties and responsibilities relevant to the nature, level and extent of the post and the grade has been established on this basis.

#### **Work Arrangements**

Transport requirements:	Travel to work sites, area offices, meetings or other venues throughout the County and region and further afield on occasion.
Working patterns:	May include weekends and evenings. Mainly office based but some travel required.
Working conditions:	Mainly indoors. Occasional exposure to working outdoors.

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**PERSON SPECIFICATION**

<b>Post Title:</b>		<b>Director/Service/Sector:</b>	Ref: 4285
<b>Essential</b>	<b>Desirable</b>		<b>Assess by</b>
<b>Qualifications and Knowledge</b>			
Minimum of at least 4 GCSE's including Maths and English grade A* to C or equivalent Qualification, or equivalent experience, of IT , administration, health or business Awareness of relevant policies, procedures, trends, developments and best practice with regard to energy efficiency retrofitting in domestic homes. Evidence of continued professional development.		NVQ or Level 3 Diploma in Domestic Energy Assessment Level 3 Award in Energy Efficiency and Retrofit of Traditional Buildings. Level 3 Award in Domestic Retrofit Advice Level 5 Diploma in Retrofit Coordination and Risk Management. Qualification in sustainable and low-energy building. Understand the diverse functions of a large complex public sector organisation and the relevant professional issues.	A/I
<b>Experience</b>			
Understanding and appreciation of the needs of older, disabled and vulnerable people and households Experience of working with vulnerable groups in at least one of the following areas: housing/social/health care/home visiting/ volunteering/ welfare benefits/advice work or other relevant customer focused areas Commitment to Fuel poverty / Climate Change issues Experience of working with financial information Experience of working with the public face to face; in writing and by phone Experience of using database client records systems Knowledge and understanding of policies relating to safeguarding, confidentiality, data protection and lone working. Good financial awareness and experience of budgeting and financial procedures. Experience in developing and maintaining excellent collaborative relationships with all relevant internal and external stakeholders.		Experience of providing energy efficiency advice to householders Experience of a recognised domestic energy model, for example, RDSAP, SAP or PHPPSustainability and energy efficiency industry experience Experience of working as a building professional within both the private and social housing sector. Experience in carrying our retrofit works in domestic settings.	A/I
<b>Skills and competencies</b>			
Excellent interpersonal, verbal and written communication skills with the ability to communicate with a wide range of individuals and ability to give structured advice to people from vulnerable groups Common sense approach to complex problems, ability to analyse and to deliver practical or innovative solutions Ability to organise work in a logical manner and able to follow prescribed administrative and clerical procedures Can show excellent team working skills yet also use own initiative and work independently		Knowledge of retrofit improvement techniques and measures Confident in reporting and presenting to internal and external stakeholders. Advanced skills in Microsoft Office and MS Projects	A/I

<p>Good negotiation and communication skills and able to persuade others to adopt an alternative point of view.</p> <p>Proficient in the use of a wide range of Microsoft Office 365 applications including Word, Excel and Outlook or Sharepoint</p> <p>Ability and commitment to accurate record-keeping</p> <p>Successful achievement and personal commitment to delivering excellent services to customers.</p> <p>Is an effective advocate for the service both internally and externally.</p> <p>Maintains a professional demeanour in stressful and difficult situations.</p> <p>.</p>		
<b>Physical, mental, emotional and environmental demands</b>		
<p>Generally, works from a seated position when in the office; however, there is a requirement to visit building sites and occupied domestic properties regularly, climb ladders and operate in poorly lit buildings.</p> <p>Need to maintain general awareness, with lengthy periods of enhanced concentration.</p> <p>Regular contact with public/clients in dispute/negotiation with the County Council which may place emotional demands on the job holder</p>		A/I
<b>Motivation</b>		
<p>A strong corporate orientation and a commitment to tackling issues in a non-departmental manner.</p> <p>Dependable, reliable and keeps good time.</p> <p>Models and encourages high standards of honesty, integrity, openness and respect for others.</p> <p>Helps managers create a positive work culture in which diverse, individual contributions and perspectives are valued.</p> <p>Proactive and achievement orientated.</p> <p>Works with little direct supervision.</p>		A/I
<b>Other</b>		
<p>Able to meet the transport requirements of the post.</p> <p>The post is subject to an enhanced DBS disclosure to carry out home visits</p> <p>Applications for flexible working 3 or more days a week (or FTE) and job share will be considered</p>	Ability to drive	A/I

Key to assessment methods; (a) application form, (i) interview, (r) references, (t) ability tests (q) personality questionnaire (g) assessed group work, (p) presentation, (o) others e.g. case studies/visits