



Retrofit Customer Service Administator

Job Description

February 2024

EMPLOYER: Cumbria Action for Sustainability (CAfS)

LOCATION: Contractually based at our office, Eden Rural Foyer, Old London Road, Penrith, CA11 8ET, however, homeworking can be agreed

REPORTS TO: Retrofit Service Manager

HOURS: 22.5 hours a week, with flexibility to work across 3, 4 or 5 days. The working times are flexible but must include core office hours of 10am-3pm unless agreed otherwise. There may also be occasional need to work evenings/weekends for event or meeting support.

START / END DATE: Start as soon as possible. Fixed term contract to 31 January 2025.

SALARY RANGE: £21,500 to £26,000 per annum full-time equivalent, (£12,900 to £15,600 for a 22.5-hour week), with starting salary dependent on skills and experience.

LEGAL RIGHT TO WORK: You must have a legal right to work in the UK as CAfS is not in a position to act as a sponsor.

APPLICATIONS BY: Application form to be sent to recruitment@cafs.org.uk by 9am on Wednesday 13th March 2024.

ABOUT CAfS:

CAfS is an award-winning charity and the leading organisation providing inspiration, advice, and support for action on climate change in Cumbria.

Our vision is a zero carbon Cumbria that is socially, environmentally, and economically beneficial for all.

Our mission is to achieve net zero by 2037 or sooner by promoting and facilitating low carbon living and its benefits – inspiring and supporting individuals, communities, and organisations across Cumbria and beyond to decarbonise lives and businesses. We provide practical support for the development of low carbon plans and policies for places, communities, businesses, local authorities, other organisations, and individuals. We inspire behaviour change and seek to deliver sustained shifts from high to low carbon

emissions through enabling new social norms and influencing key policies, strategies, and funding streams.

CAfs' HOME RETROFIT ADVICE SERVICE

We are continuing to develop and expand our Home Retrofit Advice Service to deliver a range of services to support Cumbrian homeowners to retrofit their homes. The service supports able to pay clients who wish to make significant building energy performance improvements to their homes, including upgrading the building fabric, heating system and/or ventilation system.

Our home retrofit advice services include:

- Initial telephone advice calls.
- Home Retrofit Planner audits, which profile the energy performance of the home and identify costed improvement.
- Bespoke Retrofit Plan, which establishes the preferred option.
- Pre-design, design and contracting advice.
- On-site retrofit co-ordination support (in development)

We also deliver retrofit training events and engage and map the local network of professional retrofit architects, builders and installers.

We support around 50 homeowners a year.

MAIN PURPOSE OF ROLE:

- Support the retrofit service team (including internal staff and external contractors) to use and follow our systems.
- Provide customer service administration for retrofit service clients.
- To use the Customer Relationship Management (CRM) system for data entry, creating new data record formats and for activity reporting.

KEY RESPONSIBILITIES AND TASKS :

- Support both the in-house retrofit team members and contractor retrofit assessors with set up, induction and use of CRM and IT systems related to the retrofit service.
- Maintain record systems, organising, storing and recording data in relation to the service, and ensuring ongoing implementation of data protection (GDPR) requirements.

- Liaise with the Service Manager to understand new and developing work flows, and create new data record formats on the CRM or other databases to suit requirements.
- Provide customer service administration for retrofit clients. This includes:
 - Monitoring the retrofit email inbox, responding to and direct enquiries as appropriate.
 - Sending and logging contracts and invoices for different aspects of the advice service
 - Sending and chasing up customer feedback surveys
 - Logging all activity in the CRM or other databases
- Co-ordinate contractor retrofit assessor schedules for availability for householder support. Monitor their completion of reports and associated invoicing. Log invoices and forward to manager for authorisation.
- Run reports from the CRM and other databases for the Service Manager to allow activity reporting to funders and other stakeholders.
- Provide back-up administrative support to the low carbon communities teams in relation to home energy events and engagement activities, including holiday cover and at times when additional capacity is needed. This might include logging event attendees and sending post event information.
- Support the design and implementation of quality control measures across the delivery of the retrofit service.
-

OTHER RESPONSIBILITIES:

- Help to raise the profile of CAfS' other work as opportunities arise.
- Report to line manager on progress.
- Ensure compliance with CAfS policies, procedures and guidance, GDPR, procurement, and contribute to the organisational development of these.
- Carry out other tasks or projects required from time to time, as directed by line manager.
- Contribute to the on-going work of CAfS generally, including attending team meetings and training.

Person Specification

Essential skills and attributes:

- Excellent skills and at least one year's experience in:
 - Working with data management systems, including organising data and reporting, and developing processes within the data management systems to support the customer service processes.
 - Working directly with clients, and providing high-quality customer service
- Excellent communication skills, including clear, polite and helpful communications.
- Proven ability to use a comprehensive range of IT software (especially CRM systems, Microsoft Excel and other Microsoft office software) and the willingness to train in additional IT skills as and when required.
- Thoroughness, accuracy and attention to detail, and with a good level of numeracy
- Flexibility and willingness to liaise closely with colleagues in the Low Carbon Communities team and provide back-up cover when needed.

Desirable criteria

The following attributes are **desirable** but not essential:

- Enhanced expertise in use of data management systems, including handling system upgrades.
- Experience of working with external contractors.
- Experience of working in a geographically-dispersed team and using Microsoft Teams or similar to meet.
- A basic understanding of home retrofit.
- Understanding of and commitment to CAfS' aims, values and objectives.

If you would like more information about the role, please email: tina.holt@cafes.org.uk