

Exchequer Services Support Officer

Role Profile

Service:	Finance & Systems Directorate – Exchequer Services
Band:	Career Grade Band 1 – Band 2 <i>(Appointment and progression will be based upon qualifications, experience and achieving required competency levels)</i>
Reporting to:	Exchequer Services Manager of relevant team
Responsible for:	No direct reports



TRAFFORD
COUNCIL

About Us

Trafford is a great place to live, work, learn and visit. From its leafy suburbs to its more urban areas, the borough takes pride in its strong, diverse communities, its cultural and sporting heritage and its position at the heart of the region's economic powerhouse.

Trafford Council and its partners in the public, private and third sectors have a Vision which sees us working together to close inequality gaps and maximise Trafford's huge potential.

Our vision: Trafford – where all our residents, businesses and communities thrive

At the heart of our vision is a common cause – we want to make Trafford a better borough. We want to make it a place where everyone has a chance to succeed and where everybody has a voice. Through our new vision, we are making a commitment to work together across different services and agencies to make the best use of our resources.



Our Culture

Trafford Council employs around 2300 non-school members of staff and as one of the biggest employers in the borough, we work hard to make Trafford Council an employer of choice. We care what you think and believe you are more than just a job role. We have a great benefits' package and a real focus on your health and wellbeing, as well as extensive learning, succession and development opportunities.

For us, it's not just about *what* we achieve as an organisation, but *how* we do it. Therefore, all employees are expected to display our **EPIC** values.

At Trafford Council we are EPIC

We EMPOWER – We inspire and trust our people to deliver the best outcomes for our customers, communities and colleagues.

We are PEOPLE CENTRED – We value all people, within and external to the organisation and give those around us respect. We will act with honesty and integrity in all that we do and create an environment that enables everyone we work with to thrive and succeed.

We are INCLUSIVE – We are committed to creating an environment that values and respects the diversity and richness differences bring.

We COLLABORATE – We build relationships, collaborate; treat people as equal partners and work together to make things happen.

About the Role

This Role Profile outlines the key tasks you will be expected to perform to give you an understanding of a typical day and the key activities that you will be expected to deliver or contribute to the delivery of.

The 'About You' section explores what qualifications, experience, skills and knowledge you will need for the role.

We are a values-based organisation and you will need to reflect our values, as well as the requirements in 'About You' in your application.

Overview

Exchequer Services sits within the Finance and Systems Directorate and is responsible for the main financial tasks of the Council, including:

- The billing and collection of Council Tax and Business Rates
- The assessment of Housing Benefit and Council Tax Support
- Social Care Financial assessments for those being cared for at home or in a residential Care Home
- The recovery of all associated debt owed to the Council

Your Main Priorities

- Working as part of a team to provide efficient and effective business and administrative support to Exchequer Services.
- Assisting the department with financial assessments and the collection of debt owed.

Key duties

Band 1

- Providing a polite, efficient and responsive service and dealing with enquires and requests for information from a wide range of internal and external customers.

- Using a variety of software packages and systems to process transactions and deal with customer enquiries accurately, speedily and in accordance with Council Policy.
- Handling and inputting data, ensuring accuracy, confidentiality and security of data processed including adherence to the General Data and Principles Act (or relevant legislation).
- Producing a range of documents including letters, emails, spreadsheets, forms and other written documents as required.
- Dealing with written enquiries from customers and their representatives.
- Liaising with other sections, departments and outside bodies.
- Undertaking general office duties including document imaging, indexing and filing, photocopying, e-mailing and scanning.
- Maintaining a high level of confidentiality, in line with service requirements.
- Ensuring that all work is undertaken to prescribed standards and timescales.
- Processing transactions within level of competency and escalating where necessary.
- Undertaking any other duties which are commensurate with the grade of the role and which may be required by the Service.

Band 2 (inclusive of the above)

- Processing transactions to completion, escalating complex issues only.
- Acting as a single point of contact within a specific Exchequer Services team and be able to deal with all enquiries from customers and their representatives whether face to face, by telephone or letter.
- Carrying out duties in accordance with set agreed individual performance and set quality targets.

About You

The grading of the post will depend on the qualifications, experience and knowledge of the post holder. These are set out below. Appointment to a band will depend on experience and subsequent progression will be assessed annually as part of the Performance Development Review process

Qualifications and Professional Development

- GCSE English and Maths grade 9-3 (Grades A-D) or equivalent (E.g. Level 1 or Level 2 Functional Skills in English and Maths) or working towards

- Have a personal commitment to continuous self-development and ensuring skills and knowledge are kept up to date

Experience and Knowledge

Band 1

- Ability to deal with correspondence through all communication methods, i.e. telephone, text, social media, email, written
- An understanding of good customer service standards and how to deal with customer conflict and challenge
- Understanding of accurate record keeping, manual and computerised
- Understanding of data protection and GDPR and the importance of keeping highly sensitive data secure and confidential at all times

Band 2 (inclusive of the above)

- Experience of using administration systems in a large financial organisation/service
- Experience of dealing with correspondence from internal and external customers
- An understanding of how individual performance and quality targets are set and monitored

Skills and abilities

Band 1

- Good ICT and keyboard skills including use of Microsoft applications such as Word and Excel
- Good interpersonal and communication skills, written and verbal
- Ability to respond to the needs of the service by providing timely preparation work often at the beginning of the working day
- Good literacy and numeracy skills
- Ability to record accurate information
- Ability to work on own and as part of a team
- Enthusiastic and motivated to learn new skills
- Committed to fairness and equality and sensitive to the needs of others
- Ability to work in a busy, varied and pressurised environment

Band 2 (inclusive of the above):

- Good planning and organisational skills – prioritise your own workload and meet deadlines
- Ability and desire to develop within the role and respond to performance feedback
- Able to work on own initiative with minimal supervision
- Ability to work flexibly in order to adapt to changing work priorities and service needs
- A commitment to self-development and prescribed competency levels

Special Conditions

- DBS required (Standard)
- The post holder will be subject to rotation for posts on the same pay band as required

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Prepared/revised by	LS/AM 2019 / L Shaw & L Shellabear
Job Evaluation	Existing evaluation

Health and Safety

To operate safely within the workplace with regard to the Council's health and safety policies, procedures and safe working practices. To be responsible for your own Health and Safety and that of other employees.

Equalities & Diversity

To work within the Council's Equalities and Diversity Policy, embracing through personal example, open commitment and clear action that diversity is positively valued, resulting in access for all by ensuring fair treatment in employment, service delivery and external communications.

Customer Care

To continually review, develop and improve systems, processes and services in support of the Council's pursuit of excellence in service delivery.
To recognise the value of its people as a resource.

Training and Development

To identify training and development needs with your manager, taking an active part in your Personal Development and Review Plan. To access