



ROLE PROFILE

Role Title:	Income Management Assistant
Service:	Housing and Regulatory Services, Housing Operations, Income & Financial Inclusion
Directorate:	Place and Community
Accountable to:	Team leader Income Management
Grade:	Scale 4
Car Category:	None

Purpose of role

To work as part of a specialist team to provide a high quality responsive debt recovery and income management service.

To deliver a proactive and professional service and work with the Income Management Officers, Financial Inclusion Officer and Money Advisors to support tenants through the welfare reform changes.

To prioritise and ensure prompt and effective action for the recovery of current and former tenant debt and where required, signposting tenants to other support agencies to maximise income and minimise debt.

Key Objectives

1	On a daily basis; monitor, initiate, and carry out current and or former rent arrears debt recovery in accordance with policy and process as directed by the Team leader
2	Make outbound contact to customers and make payment arrangements with customers to clear their debts and monitor that the arrangements are adhered to, working flexibly within the team on accounts that require priority intervention. Including rechargeable debts, static and new tenant debts
3	Deal with inbound enquiries from tenants regarding their rent accounts and debts instigate appropriate recovery action, including referrals and signposting to other relevant support agencies;



3	To negotiate affordable agreements and to set up and monitor payment plans to prevent start of legal proceedings and to keep debts as low as possible
4	Keep accurate records of recovery actions and activities including updating IT systems concerning the account, payment methods and contact details;
5	Provide rent account information and reference requests to other Council services and outside agencies where authority is held;
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6	Assist with preparation of overpayment and write off schedules for approval by the Team Leader Income Management; Instruct and refer accounts to trace and recovery agencies when requested.
7	Assist in the processing of direct debit payments, standing orders and taking payments when required;
8	Deal with all customer enquiries, taking payments, providing advice on payment methods, balances and referring to Money Advisors when required;
9	Ensure that those affected by welfare reforms and changes to income are contacted and provided with advice on services and referred to the Financial Inclusion Officer or Money Advisors
10	Assist those who need to relocate discussing alternatives and rehousing options; actively looking to submit and refer for discretionary housing payments where necessary;
11	Assist with the monitoring of accounts where tenants are in receipt of Universal Credit to ensure that payment methods and agreements are in place; checking for first payments and that payment dates are accurately recorded and amended when required;
12	To provide general administrative support to the team, replying to and distribute responses from automated text and telephone messaging services and service requests ensuring that performance targets are met.



13	Promote the use of online services including text and email and any other initiatives
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Scope

The post holder work as a key part of the Income & Financial Inclusion team ensuring that standards are upheld and that the Council fulfils its requirements. They will have contact with current and former tenants and other agencies, their immediate team, finance team, service managers and officers from across the organisation, answering queries in a professional manner.

Work Profile

1. Strategy

The post holder is a member of the Income & Inclusion team and as such, will contribute to the delivery of the team's objectives which support the delivery of the wider Corporate Plan.

2. Performance

The post holder will be responsible for the successful delivery of the tasks that they have are allocated and contribute to the overall performance of the wider team.

3. Service Quality

The post holder will assist in maintaining service quality to internal customers, through the effective delivery of their allocated tasks.

4. Resource Management

The post holder does not have any line management or budgetary responsibilities.

The post holder will ensure the appropriate use of equipment provided to them in order to undertake their own role.

5. Supervision and Management

The post holder does not have any line management or budgetary responsibilities.



6. Culture

The post holder will support the development of a positive organisational culture that is outward looking, evidence based and customer focused.

The post holder will promote equality of opportunity in the delivery of the duties of the role.

7. Communications

The post holder will be expected to communicate professionally and effectively with those contacting the Income & Financial Inclusion team.

8. Main Contacts Associated with Principal Duties

The main day to day contacts for the post holder will be their immediate team, service and team managers and members of the public. They may also handle calls and written contact from other parties and external organisations.

9. Commitment

The Council's normal working week for the purposes of calculation of premium rates and enhancements is Monday to Friday 7 am to 7 pm. The Council operates a standard working week of 36 hours.

10. Risk Management

The post holder will identify any risks that they encounter during the execution of their role and report these to their line manager promptly.

11. Working conditions

The post is office-based but may involve travel to other Council sites to provide support for services.

12. Equal Opportunities

The Council is committed to achieving equality of opportunity both in the delivery of services to the community and its employment arrangements. We expect all employees to understand and promote our policies in their work.

13. Customer Focus:





To meet the Council's Standards of Customer Care at all times.

14. Core Tasks

To undertake any other duties which may be required within the needs of the service that are commensurate with the grade.

15. Health & Safety

All employees have a responsibility for their own health & safety and that of others while undertaking their duties. Employees have a general duty to assist the Council in implementing its general statement on health & safety policy.

16. Legislation

To comply with Data Protection legislation and all other relevant and applicable statutory legislation together with Council policies and procedures

17. Training & Development

To comply with the Council's policies and practices relating to training and development, including a regular development appraisal.

18. I.T.

The post holder is expected to comply with the Council's policies and practices relating to use of I.T. and equipment.

19. Creativity

The post holder can contribute ideas relating to the tasks that they undertake, to their line manager for consideration.

20. Decisions and Consequences

The post holder will usually carry out allocated tasks and duties under the supervision of their line manager.

21. Work Context



The post holder work as a key part of the Income & Financial Inclusion team, ensuring that standards are upheld and that the Council fulfils its requirements.

They will have contact with members of the public, external organisations, their immediate team, finance team, service managers and officers from across the organisation, answering queries in a professional manner.

The above duties and responsibilities do not include or define all tasks, which may be required to be undertaken by the post holder. The duties and responsibilities may vary without changing the general character of the duties or the level of responsibility entailed. These factors are reflected in the grading of the post.

22. Physical Demands

The post is normally office-based, so no unusual physical demands have been identified.



PERSON SPECIFICATION

In this section the Skills, Knowledge, Qualification and Competency requirements to perform the role to a satisfactory standard are set out. The extent, nature and level of the role holder's knowledge and skills should be specified

PERSON SPECIFICATION	Examples specific to role	Required		Method of Assessment Application (A) Interview (I), Testing (T), Reference (R)
		Essential	Desirable	
SKILLS AND KNOWLEDGE Technical knowledge and qualifications	Minimum qualification of GCSE English and Mathematics at grade C or equivalent comparable work experience or the successful completion of a West Lancs Apprenticeship placement and qualification in a related subject.	X		A
	Have a basic understanding of welfare benefits			
	Previous administrative experience in a busy office environment	X		A,I
	Experience of using Microsoft applications in particular Word, Excel and Outlook	X		A, I
	Experience of working with databases and records			
	An understanding of debt recovery and income management	X		A, I
Planning and organising work	Excellent organisational skills	X		A, I
	Excellent administration skills with a high level of attention to detail	X		A, I
		X		A, I



	Ability to prioritise own workload, work under pressure and meet multiple deadlines	X		A, I
	Ability to handle confidential information			
Planning capacity and resources	N/A			
Influencing and interpersonal skills	Ability to communicate effectively both orally and in writing	X		A, I
	Customer focused with good interpersonal skills	X		A, I
	Ability to work as part of a team with a flexible approach	X		A, I
PROBLEM-SOLVING	Enthusiastic and positive attitude	X		A, I
Using initiative to overcome problems	Able to contribute constructive ideas to the team	X		A, I
Managing risk	Able to identify and report any risks encountered during the execution of the role	X		A, I
Managing change	Able to handle change with a resilient and positive attitude	X		A, I
ACCOUNTABILITY and RESPONSIBILITY	Able to work well with minimal supervision	X		A, I
Undertakes tasks without supervision				
Other	Commitment to Equality	X		A, I
	Commitment to Health & Safety	X		A, I
	Satisfactory Baseline Personnel Security Standard Check	X		Document Checks (includes Basic DBS)
	The ability to fulfil all spoken aspects of the role with confidence through the medium of English language. This includes the ability to converse with ease with customers and	X		I



	colleagues and provide advice in accurate spoken English	X		A, I
	Flexible disposition	X		A, I
	A willingness to undertake training			

COMPETENCIES REQUIRED – All post holders must be able to comply with the Council’s Expected Behavioural Standards which include:

- Putting customers first;
- Being positive and adaptable;
- Taking responsibility and achieving results;
- Working together.

In addition, for those posts with management responsibilities the Expected Behavioural Standards will include:

- Service delivery and change management;
- Financial and resource management;
- Leading, motivating and developing.

Other information

- able to travel to meet service delivery requirements
- available to undertake work outside of normal working hours

Signed Line Manager	Signed Head of Service	
Print Line Manager	Print Head of Service	Date