

Revenues Caseworker

Role Profile

Service: Exchequer Services
Band: Band 5
Reporting to: Senior Revenues Officer
Responsible for: No direct reports but role includes mentoring, advice and guidance



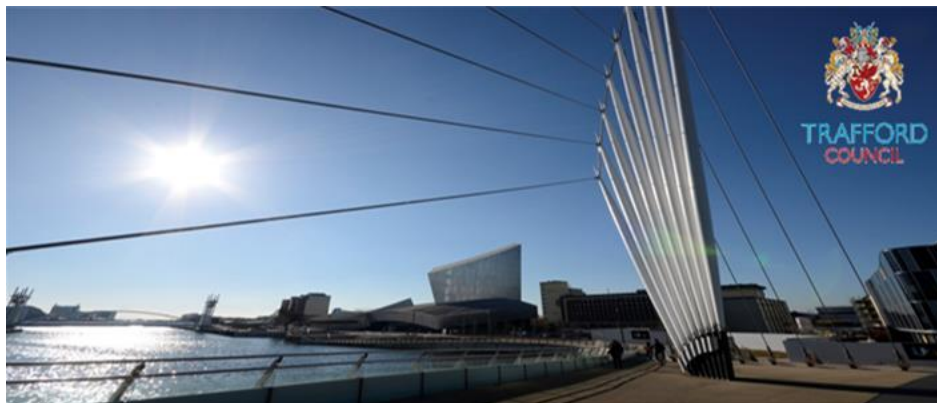
About Us

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 prosper

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. The Revenues Service is a high performing, outcome based, resident and businesses focused service which performs a number of operational and front-line contact tasks within the Council Tax, Business Rates, Accounts Receivable and Adult Social Care debt areas of work.

Your Main Priorities

- Provision of a high quality, customer facing case worker service to Trafford residents and businesses accessing a Revenues (Council Tax/Business Rates/Corporate Debt) related matter.
- Acting as a key single point of contact to residents and businesses from the initial identification/contact through to offering full advice and support and ultimately successfully recovering any outstanding debts.
- Working across the service and Council to ensure that the caseworker ethos 'you only have to tell your story once' is adhered to and ensuring 'warm handovers' take place in cases that have to be signposted for further advice and support.

Key duties

- Communicating in an excellent manner with residents and businesses, both written and verbal, with the ability to remain calm under pressure
- Linking and prioritising the repayment of Council debts as well as providing support on external debts customers may have.
- Provision of information, advice and support throughout the process.
- Acting as a key single point of contact to the customer, Enforcement Agents, Valuation Office Agency, Benefits agencies, Councillors, MP's and other external organisations.

- Responding to Level One complaints, investigating and providing the supporting information for Local Government Ombudsman written responses.
- Referring customers identified as requiring benefit maximisation and/or budgeting support to relevant internal teams and/or external organisation with a warm client handover.
- Provision of accessible and high-quality advice and information to an excellent customer service level including face to face advice via drop-in surgeries, home and site visits (joint with professionals in appropriate cases) and telephone advice in a variety of settings.
- Provision of expert advice in relation to Council Tax/Business Rates liability matters, discounts, reliefs, exemptions including escalated complex matters referred by the relevant internal teams.
- Attending panels to discuss or present cases that are complex and therefore require further support from other internal and external agencies.
- Liaising with the Valuation Office Agency, Valuation Tribunal and customer representatives such as rating agents agencies
- Keeping abreast of developments in Council Tax/Business Rates policies and practices, including benefit related matters affecting liability.
- Developing and maintaining contacts with relevant agencies and staff who work with key vulnerable groups such as Care Leavers, Complex Families Team as well as colleagues within the Assessments and Client Services team.
- Advising, training and expertly mentoring colleagues in all aspects of the role where required.
- Publicising and promoting the Service through talks and contact with groups in Trafford.
- Ensure all records, manual and computerised, are kept in accordance with the GDPR and information obtained is treated as highly sensitive and confidential at all times.
- Undertake any other duties commensurate with the grade of the role as may be required by the service.

About You

Qualifications and Professional Development

- Good standard of secondary education including Maths and English GCSE grades A to C or equivalent or working towards a relevant qualification
- Commitment to (within 12 months) or studying the IRRV qualification (if not already attained)
- Commit to undertaking a Customer Excellence training programme, including dealing with customers over the phone and face to face.

Experience and Knowledge

- At least 2 years' work experience in either a Council Tax **OR** a Business Rates environment

- At least 2 years' work experience of providing excellent customer service in a Council Tax **OR** Business Rates environment
- Have a proven track record of managing a workload and consistently achieving individually set targets, clearly demonstrating the ownership of that workload.
- The knowledge to provide advice to Trafford residents and/or businesses or their representatives on all Council Tax **OR** Business Rates matters.
- The knowledge to provide advice to professionals and the relevant Exchequer Services panels on all Council Tax **OR** Business Rates matters.
- An understanding of the benefits and discretionary schemes operated within Exchequer Services and how they interact with Council Tax residents **OR** an understanding of the Strategic Growth teams offer and how they can provide wider support to businesses.

Skills and abilities

- Self-motivated with the ability to manage own caseload, and of working under pressure with minimum supervision, whilst proactively resolving problems using own initiative.
- Ability to adapt positively to change and contribute to the shaping of the service delivery model as it evolves.
- Ability to build positive working relationships with colleagues across the Council to ensure warm handovers can be practised.
- Proven success in developing effective working relationships with colleagues and partner organisations with the ability to communicate, both verbally and in writing, with a variety of audiences including Councillors and MPs.
- Ability to positively engage with people to discuss financially sensitive matters, delivering a thorough and efficient specialist casework service to meet set targets.
- Ability to be a specialist in the role, acting as the go to person for internal and external customers, creating personal development plans to meet the gaps in knowledge and keep up to date.
- Ability to lone work, without supervision, out of the office, and during home/site visits whilst adhering to Lone Working guidelines.
- Ability to work positively as part of a team both with colleagues and other professionals.
- Good administrative and organisational skills including the use of IT.
- Ability to communicate and negotiate with a wide range of people from a diverse range of backgrounds.
- Ability to identify risks and needs to make appropriate 'warm handover' referrals and liaise with relevant agencies.

Special Conditions

- Willing and able to occasionally travel within and outside of the borough boundaries for the purposes of work
- DBS required
- Work will be required out of normal office hours (unsocial) from time to time

--

Date prepared/revised	21.11.20 / 20.2.24 minor amends and transferred to new template
Prepared/revised by	L Shaw / L Shellabear
Job Evaluation	7.12.20

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 development opportunities as they arise and share learning with others and where appropriate, actively encourage a learning environment and development within others.

Policy

To work at all times within the established policies and practices of the Council, within the framework established by the Council Constitution and associated guidance.

Information Governance

Confidentiality is of prime importance. In the normal course of duties, the post holder will have access to personal and or sensitive information relating to service users, staff and contractors, as well as information of a commercially sensitive nature. Such information should not be communicated to anyone outside or inside the Council unless done in the normal course of carrying out the duties of the post. Disciplinary action will be considered where a breach of confidence and or data breach has been established.

All information obtained or held during the post-holders period of employment that relates to the business of the Council and its service users and employees will remain the property of the Council. Information may be subject to disclosure under relevant legislation.

To ensure information is shared safely and complies with information governance standards and associated legislation.