



**JOB DESCRIPTION (JD)  
AND EMPLOYEE  
SPECIFICATION (ES)**

Standard Template

<b>JOB TITLE:</b>	Income Collection Assistant		
<b>GRADE:</b>	G5	<b>SERVICE AREA:</b>	Finance
<b>JOB CODE:</b>			
<b>REPORTS TO:</b>	Income Team Manager	<b>LOCATION:</b>	Within Walsall Council
<b>SPECIAL CONDITIONS:</b>	As a front facing role, this post is covered by the Governments Code of Practice on the English Language Fluency Duty for public sector workers. You will be expected to communicate verbally with customers and provide advice and/or information in accurate spoken English.		

**1. Main purpose of the job role:**

To provide an efficient and effective income collection service to meet the aims, objectives and needs of Financial Administration and the wider organisation.

**2. Role specific duties and accountabilities:**

- Maximise and secure income due to the Council by undertaking all aspects of income and debt recovery activity in an effective and timely manner and in accordance with relevant policies, processes and procedures. Methods of recovery will include, but are not limited to, outbound telephone, letter, email collection activities and the referral of debts to collection agents.
- Evaluate the financial position of debtors, provide practical support and advice regarding payment options, including instalment arrangements and where appropriate refer customers to internal and external support/advice agencies.
- Provide training, support and information relating to income collection and debt recovery policies, processes and procedures to colleagues and other stakeholders as appropriate including attending and actively participating in working groups and other meetings as appropriate.
- Prepare accurate, clear and concise casework records/notes and identify/enter key action points/outcomes/dates (incl. diary entries) on relevant systems (including debt collection agency systems) to ensure timely monitoring of arrears cases in accordance with the relevant policies and procedures.
- Review outstanding cases on a regular basis, including interrogating corporate and department systems and where appropriate prepare relevant notes/documents for handover of cases to senior colleagues where legal recovery activity is required.
- Ensure the accurate and timely processing, validation and despatch of financial transactions and documents (including credit notes, invoices and write-off requests), and dealing with matters on non-compliance in accordance with relevant policies and procedures.
- Assist in providing a high-quality, cost effective, best in class customer focussed service, working with customers to focus on the prevention of debt, whilst ensuring their needs are met.
- Providing support to senior colleagues in dealing with customer disputes and complaints and identifying/implementing appropriate service improvements.
- Effective use of corporate and department IT systems including the maintenance of data and production of reports to ensure the accurate monitoring and reconciliation of financial information.

- Support an integrated approach by providing input into Team workplans and working across the service to ensure that corporate, service and team objectives and targets are met.
- Provide training, support and advice relating to the council's financial transaction systems and processes.
- Demonstrate a flexible approach to undertaking all duties and effectively manage own workloads and resources as allocated.
- Support the final accounts process and internal audits including ensuring compliance.
- Contribute to the development and implementation of, new systems, processes, procedures aimed at maximising service efficiency and/or responding to new legislation, guidance, and other changes.

### **3. Corporate duties and accountabilities:**

- The post holder will comply with and promote the Council's Health, Wellbeing and Safety at Work policies and ensure these are implemented effectively within his/her areas of responsibility.
- Through personal commitment and clear action, the post holder will promote the Council's employment policies, with particular reference to diversity, equality of access and treatment in employment, service delivery and community involvement. To support/develop a working culture within these services that reflects the corporate vision.
- Ensure that the services provided aligned to the Council strategy, vision, aims, objectives, priorities and continuous improvement programme and play their part in achieving these. This includes compliance with Standing Orders, Financial Regulations, Code of Conduct and the Councils Policies and Procedures.
- This job description sets out a summary of the duties and accountabilities of the role. It is not intended to be exhaustive.



JOB TITLE <b>Income Collection Assistant</b>	<b>GRADE G4</b>	
Using the Job Description consider what essential behaviours, abilities and knowledge are required by a person to perform each of the main activities and accountabilities of the job safely and effectively.	Indicate when Assessment is possible: at Application form=S interview=I both=S/I test = T	<b>WEIGHT CODE</b> shows relative importance Low=1 Medium=2 High=3
<b>Behaviours:</b>		
<b>Professionalism</b> - Actively seek ways to prevent over-complication or confusion of service delivery through innovation, being open to change and the removal of barriers including challenging negative behaviours.	I	3
<b>Leadership</b> - Leads by example, optimising those resources allocated, Communicates clearly taking account and welcoming feedback. Takes a positive and resilient approach to change understanding the longer-term vision of the Council and/or service areas.	Not Applicable	
<b>Accountability</b> - Adopt a 'can do' attitude in the work that I deliver taking accountability for my own performance and development and responsibility for my actions and decisions. I will demonstrate inclusivity and promote the values of diversity and equality.	I	3
<b>Transparency</b> - Work with others to reach a common goal; sharing information, supporting colleagues and searching out expertise and solutions from relevant partners and/or communities we serve.	I	3
<b>Ethical</b> - Aware of own impact on others through valuing openness, treating everyone with respect and listening carefully to understand the views of others in order to build trust.	I	3
<b>Abilities/Skills:</b> (refer to JE guidance document)		
Ability to evaluate the financial position of a debtor and provide advice and support regarding payment options, including agreeing instalment arrangements.	S/I	3
Ability to use IT systems to process transactions, enter case notes, produce reports, and monitor and reconcile financial information.	S/I	3
Able to show a flexible approach to working and manage own workloads including monitoring and reviewing allocated cases on a regular basis and providing updates to senior manager and colleagues as required.	S/I	3
Able to show understanding of Health and Safety issues.	I	2
<b>Knowledge/Experience:</b> specify type, level and qualitative (not quantitative required); if any.		
Substantial experience of debt recovery processes and methods to maximise income, including the use of various income recovery techniques plus experience in recording clear and concise records/notes to ensure timely monitoring of arrears.	S/I	3
Experience of processing and validating transactions and control documents and understanding matters of non-compliance of processes and procedures.	S/I	2
Knowledge and understanding of objectives and targets.	S/I	3
Experience of providing a customer focussed service and ability to communicate effectively.	S/I	3
Experience in the use of financial systems and processes, and experience of reviewing those systems and processes in order to identify and develop improvements and implement new ways of working, including any service improvements identified from customer disputes and complaints.	S/I	2
Experience in providing training, support, advice and information relating to income collection and debt recovery processes, procedures and systems,	S/I	2

including effectively participating in meetings and working groups to share knowledge in these areas as appropriate.		
Experience of providing support on final accounts and audit matters.	S/I	2
Must have experience of working in a financial administration environment plus knowledge of financial issues relating to local government.	S/I	3
Evidence of continuous professional development (where applicable)	I	2
<b>Qualification:</b> Specify any qualifications that are a minimum requirement, please include any equivalent qualifications that would be deemed acceptable or if this can be obtained through on the job experience.		
Literacy Level 2 and Numeracy Level 2	S	
Possession of a business & finance qualification at NVQ level 3 or equivalent job experience.	S	
<b>Other Essential Requirements</b>		
An awareness of, and commitment to, equality of opportunity	I	3
Awareness of, and commitment to, confidentiality and handling data	I	3
Must have the ability to communicate verbally with customers and provide advice and/or information in accurate spoken English.	I	3
<b>Prepared by:</b>	Debbie Roberts	<b>Date:</b> Nov 23