

ROLE PROFILE

ROLE TITLE	Service Charge Financial Officer
DEPARTMENT	Property Management
OPERATING ASSOCIATION/ DIRECTORATE	Customer Services
RESPONSIBLE TO	Service Charge Team Leader
RESPONSIBLE FOR	n/a

ROLE PURPOSE	<i>One or two sentences giving a simple statement of why the role exists</i>
<p>To ensure year end budgets and statements are prepared accurately and in a timely fashion, in line with KPI's, and provided to customers in a clear and concise manner.</p>	

ACCOUNTABILITIES / RESPONSIBILITIES	<i>Statement of the main areas of accountability and responsibility</i>
<ul style="list-style-type: none"> • Work with Property Managers and other internal staff members to ensure the timely and accurate preparation of year end budgets and year end account statements. Keeping in line with agreed KPI's. • Liaise with Property Managers, and other staff members, to ensure regular review of costs and actual v budget monitoring. • Take ownership of portfolio/workload, ensuring working towards own individual and team targets. • Analysis of incurred costs to ensure accuracy. • Reconciliation of costs, including posting entries to system to accurately reflect any necessary changes. • Posting of accruals / prepayments. • Providing relevant information to Head of Service Charge and/or Service Charge Operations Manager when requested. • Maintaining regular contact with customers, establishing their requirements. • Providing customers with ongoing support and assistance that meets their requirements. • Providing accurate information for internal and external customers • Ensuring that all information is provided in accordance with agreed timetables and formats. • Providing administrative support for example issuing letters and statements, coding of invoices, archiving and filing, photocopying / scanning etc. • Take ownership of complex customer issues, ensuring they are seen through to resolution. • Take ownership of queries, ensuring they are resolved within agreed 	

timelines, supporting departmental targets.

- Ensure all required information on service charges is produced in accordance with agreed timetables and formats.
- To ensure that all service charge records are up to date and reviewed accordingly
- Prepare all specialist correspondence with regard to Service Charges, such as Sec 20b and S20 for major works and long term agreements Notices and ensure they are issued in accordance with the statutory timescales.
- To attend First Tier tribunals when required
- To attend meetings both internal and external when required
- To attend all training sessions as required
- Completion of other ad-hoc tasks as required.

KNOWLEDGE/SKILLS/EXPERIENCE/PHYSICAL REQUIREMENTS	<i>The tools needed to do the role</i>
Essential	<ul style="list-style-type: none"> • Experience of Service Charges • Working knowledge of Landlord & Tenant law in particular the key issues regarding Service Charges. • Attention to detail and accuracy. • Good general standard of education, in particular a good level of numeracy. • IT skills including use of word and excel and experience of data entry and databases. • Planning and organisational skills. • Flexible approach to working hours to be able to respond to times of peak demand (year end etc.). • Confident in dealing with customers by phone, letter or in person and able to deliver great customer service.

Orbit is an Equal Opportunities Employer and all staff are required to read and adhere to Group and local policies and procedures relating to Equality and Diversity

Orbit requires all employees to read and adhere to Health and Safety policies and procedures

Orbit requires all employees to read and adhere to all Orbit policies and procedures and Standing Orders.

Signed by Employee		Date	
Signed by Manager		Date	