



# ROLE SPECIFICATION



**WOKINGHAM**  
BOROUGH COUNCIL

<b>Job Title</b>	Case Owner (Level 2) – Schools Finance		
<b>Service</b>	Resources and Assets		
<b>Team</b>	Finance Business Partnering	<b>Location</b>	Shute End/Smart Working
<b>Reports to</b>	Schools Finance Manager	<b>Grade</b>	5

This job description sets out the duties of the post at the time it was drawn up. Such details may vary from time to time without changing the general character of the duties or the level of responsibility involved.

## Summary of Role

- To work effectively with Schools Finance case owners and specialists co-ordinating and galvanising case owner activity to meet their operational needs
- To support the operational and functional management of the Finance Services function ensuring the provision of a responsive service to internal and external customers

## Key Accountabilities

### Service Delivery Accountabilities

- Assist the efficient, effective and consistent processing and resolution of customer case work, identifying and meeting customer needs and ensuring the sharing and dissemination of best practice.
- Assist with the understanding of customer need and enabling a speedier, simpler, more responsive customer journey contributing to the continuous improvement in the delivery of the Council's outcomes and ensuring high levels of internal customer satisfaction.
- Assist with knowledge sharing across case work teams.
- Supporting customer self-serve and spotting opportunities for the Council to initiate further enabling and self-serve.
- Manage customer issues effectively and understand when to consult with others, including specialists. Maintain confidentiality in line with agreed policy and relevant data protection legislation.
- Personally own the resolution of some complex cases.
- Assist with the design and development of tools and guidance notes for the areas of specialism to enable the team to self-serve and widen their knowledge.
- To support the continuous improvement of processes and procedures within the service using best practice from others where appropriate.
- To provide support for the escalation of service issues

Additional Corporate Responsibilities				
1	<b>Health and Safety:</b> Take reasonable care for the health and safety of yourself and of other persons who may be affected by your acts or omissions at work; and co-operate with the Council to enable the Council to perform or comply with its duties under statutory health and safety provisions.			
2	<b>Equal Opportunities:</b> To take positive action to ensure a thorough understanding of, and positive commitment to, equality in both service delivery and employment practices.			
3	<b>Safeguarding responsibilities:</b> At all times to demonstrate and positively reinforce our commitment to safeguarding and promoting the welfare of children and vulnerable adults.			
4	<b>Special Factors:</b> These will vary from role to role as defined within the individual contracts of employment.			
5	<b>Behaviour:</b> Works within the Council's "competency framework" and adheres to the Code of Conduct and the Council's Constitution.			
Competencies Required in Role				
Core Competencies	Foundation	Proficient	High Achiever	Role Model
21 <sup>st</sup> Century Public Servant		✓		
Personal Responsibility		✓		
Professionalism & Know How	✓			
Working together	✓			
Person Specification				
Qualifications				
Essential		Desirable		
<ul style="list-style-type: none"> <li>Practical work experience in a similar environment.</li> <li>Good standard of education, including excellent literacy and numeracy skills.</li> </ul>		<input type="checkbox"/> NVQ, BTEC or other relevant qualification in Customer Services		
Technical Skills				
Essential		Desirable		
<input type="checkbox"/> Good IT skills including office software such as Microsoft Word, Outlook, PowerPoint and Excel		<input type="checkbox"/> Experience of using relevant technology and software used within similar service areas.		
<input type="checkbox"/> Good written and verbal communication skills				



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<input type="checkbox"/> Ability to actively listen in order to extract and assess the important information	
<b>Knowledge &amp; Experience</b>	
<b>Essential</b>	<b>Desirable</b>
<input type="checkbox"/> Experience within a customer-focused service providing excellent customer service	<input type="checkbox"/> Basic working knowledge of the legislative frameworks surrounding the areas of specialism
<input type="checkbox"/> Experience of administering processes to tight timescale and with high levels of accuracy	<input type="checkbox"/> Experience of supporting and developing others
<input type="checkbox"/> Experience of assisting in delivering change particularly in relation to process improvement	<input type="checkbox"/> Good working knowledge of the policies and processes across some of the specialist areas