

MOAT

JOB DESCRIPTION & PERSON SPECIFICATION

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|-----------------------------|--------------------------------|
| Job Title: | Service Charge Officer |
| Directorate: | Finance and Corporate Services |
| Department: | Accounting Services |
| Reports to (title): | Service Charge Team Leader |
| Directly supervises: | N/A |
| Updated: | April 2018 |

Main Purpose of Job:

To provide excellent customer service to all Moat service users by ensuring service charges are budgeted and charged fairly to residents in accordance with legislation and agreements.

Key Tasks:

1. Set service charge estimates for all existing stock annually, complying with tenancy agreements and leases and adhering to current legislation.
2. Regular reconciliation of scheme accounts on finance accounting system identifying any discrepancies and provision of reports to relevant departments to investigate and resolve.
3. Reconcile actual costs for all stock with a variable service charge and issue year end statement of accounts, complying with agreements, leases and current legislation. Assist Team Leader in liaising with external auditors, providing resolution of queries relating to the year-end accounts.
4. Monitor the financial performance of Managing agents by ensuring compliance with leases and agreements from estimates & final accounts. Work with the Managing Agent Officer to challenge Managing Agents if accounts are inaccurate and to issue legal notices in cases of non - compliance.
5. Review all schemes ensuring existing reserve/sinking funds are up to date and accurately recorded or implemented if necessary and, following the annual reconciliation; notify residents (via audited accounts) of balance of reserve/sinking funds.
6. Take ownership to investigate and respond to any service related complaints/ queries from customers within set timescales at all times. This is to be carried out with reference to tenancy agreements and leases and current legislation.
7. Provide advice & support to the business to produce accurate service charge estimates for new schemes, including the calculation of charges for Capital Projects Committee, and collating and interpreting all legal documentation to ensure service charges are set in accordance with the same.
8. Attend & represent Moat at first-tier tribunal hearings and resident meetings in collaboration with relevant internal departments.

To comply at all times with current legislation relating to service charging by sourcing and attending training both internally and externally, and also to comply with Moat's:

- Equal opportunities policy
- Health and safety policy

- Policy on confidential reporting (whistleblowing)

To carry out any other duties consistent with the post that may be required from time to time, at the discretion of the line manager.

PERSON SPECIFICATION: Service Charge Officer

| CORE COMPETENCIES | |
|--|-----|
| Drive for Results | 2 |
| Customer Service | 1 |
| Team play | 1 |
| Interpersonal Effectiveness / Managing Relationships | 2 |
| Change Orientation | 1 |
| MANAGEMENT COMPETENCIES | |
| Managing people and performance | n/a |
| Managing Resources | n/a |
| Strategic Capability | n/a |
| Visionary Leadership | n/a |

This table should be read in conjunction with the Moat Competency Framework.

TECHNICAL COMPETENCIES

Entry Requirements:-

- A good standard of education, with good numerical ability in particular.
- A working knowledge of MS Office, with proficient intermediate use of MS Excel.
- Good understanding in the use of financial, and other, database systems.
- An operational understanding of all legislation and best practice as it relates to service charges.
- An operational understanding of the application of service charges in the social housing sector, including in the context of lease arrangements.

Proficient Requirements:-

- A thorough and detailed knowledge of legislation and best practice as it relates to service charges in both the public & private sectors
- A thorough and detailed knowledge of procedures and requirements for first-tier tribunals, supported by practical experience.