

Job Description

Job title	Insurance Officer
Directorate	BUSINESS : Business Support
Division	Corporate Accounts
Range	MPR 3
Reports to	Finance Business Partner (Capital & Insurance)

Main purpose of the job:

To handle complex financial enquiries relating to the insurance service within the council by telephone, e-transactions and face to face, where necessary undertaking rules based assessments and other service specific activities.

If appropriate, undertake investigations of customer needs, linking with other services to form a whole view of the customer, applying technical knowledge where necessary to formulate an outcome. Where appropriate apply specialist policy and/or calculations to undertake financial transactions.

Liaise with stakeholders in a way that promotes the [vision and values](#) of the Council.

Accountabilities and outcomes:

Completing accurate records and keeping customers informed of outcomes.

Apply legislation or policy to rules based financial assessments that fit with current practice requirements, ensuring knowledge base is kept up to date as appropriate.

To deliver a range of high quality financial services which may include preparing, controlling and monitoring budgets and closing of accounts.

To assist with associated complaints and freedom of information requests relating to the services within this area.

Activities could include claims handling, insurance renewals, policy queries, risk management activities etc. At the discretion of the Head of Service, such other activities as may from time to time be agreed consistent with the nature of the job described above.

Key Corporate Accountabilities:

To work with colleagues to achieve service plan objectives and targets.

To understand and actively keep up to date with GDPR responsibilities, including completing regular refresher training.

Safeguarding is everyone's responsibility: all employees are required to act in such a way that safeguards the health and well-being of children and vulnerable adults.

To participate in the Performance Appraisal process and contribute to the identification of own and team development needs utilising the Career Development Framework.

To actively promote the Council's Fair Access, Diversity and Inclusion Policy and observe the standard of conduct which prevents discrimination taking place.

To ensure full compliance with the Health and Safety at Work Act 1974, the Council's Health and Safety Policy and all locally agreed safe methods of work.

To fully understand and be aware of the commitment to the duty under Section 17 of the Crime and Disorder Act 1998 to prevent crime and disorder.

Promote the Medway Carbon Neutral by 2050 commitment; supporting the Council action plan to ensure we play our part in addressing the climate emergency.

Organisation:

This role reports to the Finance Business Partner (Capital & Insurance)

The post holder will not be required to line manage others but may be required to direct, coordinate or train other employees.

The post holder will be required to liaise with all stakeholders both internal and external to the organisation.

Working Style:

HYBRID - a flexible working arrangement whereby an employee can undertake their work either in the office and/or partially or mainly from home on a temporary or permanent basis.

Person specification

All criteria at level A are considered essential unless stated otherwise.

Qualifications

Level A

- Possession of AAT (Association of Accounting Technicians) qualification or other similar or insurance based qualification; or extensive relevant experience working within a finance or insurance environment
- Good standard of education including GCSE grades 4-9 or equivalent in Maths and English

Level B (in addition)

- <add in role specific qualification>

Level C (in addition)

- <add in role specific qualification>
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Knowledge

Level A

- Ability to demonstrate the practical and/or procedural knowledge across a technical or specialist area and has the ability to undertake a wide range of activities, or an equivalent level of organisational, procedural and policy knowledge. Ability to use literacy, numeracy and ICT skills to complete a range of highly complex tasks and assessments, such as writing reports, letters, presentations and undertaking complex assessment of need and calculations.

Level B (in addition)

- <add in role specific knowledge>

Level C (in addition)

- <add in role specific knowledge>
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Experience

Level A

- Demonstrable experience of working within a finance or insurance environment or in a similar post.
- Experience at an advanced level of Excel spreadsheets.
- Where the role requires it, technical ability in preparing, controlling and monitoring budgets and closing of accounts

Level B (in addition)

- <add in role specific experience>

Level C (in addition)

- <add in role specific experience>
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Skills

Level A

- Proficient in the use of Microsoft Word, Excel and Outlook
- Full driving valid for use in the UK and access to own transport for work purposes
- Demonstrable ability to use judgemental, analytical or creative and developmental skills to interpret information or situations and to solve varied problems or develop solutions or plans over the short term.
- Demonstrable ability to use written and oral communication skills to present varied information in an understandable way to a range of audiences including other staff and customers.
- Demonstrable ability to work within recognised procedures which leave some room for initiative, including lone working, previous experience of responding independently to unexpected problems and situations and only referring to a supervisor/manager for unusual or difficult problems.
- Demonstrates the ability to either:
 - (i) deal with considerable levels of work-related pressure, for example from deadlines, interruptions or conflicting demands, or
 - (ii) the equivalent of between one and two hours undertaking repeated manual calculation or other work with figures, report writing or preparing presentations, or
 - (iii) periods of hours at a time (e.g. a morning or afternoon) being alert to risks or the checking of documents or equivalent.
- Can demonstrate dexterity, co-ordination or sensory skills, where there is some demand for precision in the use of these skills, for example driving and/or the general use of a computer during the working day.

Level B (in addition)

- <add in role specific skills>

Level C (in addition)

- <add in role specific skills>