

Job Description and Person Specification

Post Title: Insurance and Accountancy Officer

Reports to: Accountancy Service Manager

Scale: 4

Politically Restricted: Yes

Overall Purpose

1. As a member of the Finance Team to provide effective Financial Services to support the delivery of high quality, cost effective, customer focused services which maximise the contribution of the Councils assets.
2. To manage the day to day administration of the Council's insurance policies and premiums, maintain insured inventories, monitor and review adequacy of cover, record and administer incidents and claims and deal with all associated administrative tasks and queries.
3. To develop along with team members a high quality cost effective service in the following functional areas:
 - a. Insurance administration
 - b. Budget Monitoring

Key Roles, Tasks and Responsibilities

1. To liaise with appropriate Officers to understand the insurance requirements in relation to all property, plant and equipment, motor vehicles and sundry items insured.
2. To maintain summary details in respect of each policy, showing items and risks insured, policy excesses, insurance ratings and premiums.
3. To provide policy renewal or tendering information in accordance with advised time scales, review levels of cover, self-insurance, excesses and claims for recommendation to the Accountancy Services Group Manager, and to contribute to the formulation of the revised insurance arrangements.
4. To provide outturn information in relation to insured values, to make and provide accounting estimates of premium adjustments so arising and to reconcile all control accounts as assigned.
5. To check, calculate, process and record all charges and recharges of insurance premiums and associated costs and to provide accounting year end information as required.
6. To receive notification of incidents and insurance claims, notifying the Council's insurers and others in accordance with policy and internal

requirements and in the required manner. To supply such cost reports and ancillary information that may be required.

7. To respond to claimants' enquiries regarding progress of claims, liaising with and referring to insurers and their representatives as appropriate.
8. To maintain an accurate and up-to-date internal claims and incident history in line with the internal procedures and to provide summary reports as required.
9. To monitor revenue budgets on a monthly basis, identifying and addressing any areas of concern with the appropriate budget holder.
10. To ensure that all budgets for specified areas of responsibility are produced and completed on time.
11. To maintain a professional relationship with external agencies, key partners and customers.
12. To carry out any other duties as may be deemed necessary by the Accountancy Services Manager or Finance Group Manager.
13. Attendance at evening council Meetings/Committees and working outside normal office hours may be required.

Post Characteristics

Allowances: N/A

On call/emergency situations: N/A

Security/safeguarding checks: None

Health and Safety Responsibilities

1. To be familiar and comply with the Council's health and safety policies and procedures and local department specific health and safety policies and procedures as amended or added to from time to time.
2. To report any unsafe practice, accident, incident, dangerous occurrence or hazard found during the course of your work to your line manager or the Corporate Health and Safety Adviser for action.
3. To take reasonable care for health and safety of yourself and others.
4. To co-operate with all staff and members of the authority so far as is necessary to enable all health and safety requirements are complied with.
5. To not intentionally or recklessly interfere with or misuse anything that has been provided in the interests of health and safety.
6. To maintain any Personal Protective Equipment that you are issued and required to wear, and to report any defects to your line manager.

Emergency Planning/Response Responsibilities

1. To carry out the duties specified in relation to the post in the Emergency Plan, Business Continuity and other associated documents.

Person Specification

Knowledge

Essential:

Good technical knowledge of insurance administration and procedures (3,4*).

Understanding of double entry accounting (3, 4*).

Computerised accounting systems (3, 4*).

Office software – Excel, Word and Outlook (3, 4*).

Desirable:

Control account reconciliations (3, 4*).

Experience

Essential:

Experience in the administration and procedures in relation to; insurance claims, adequacy of insurance cover and application of insurance knowledge in relation to incidents (3, 4, 5*).

Budget production and maintenance (3, 4*).

Computerised accounting systems (3, 4*).

Office software – excel, word and outlook (3, 4*).

Skills/Abilities

Essential:

High and proven interpersonal skills (4, 5*).

High and proven written and verbal communication skills (3, 4, 5*).

Proven ability to work methodically and to a high level of accuracy (3, 4, 5*).

High level of competence in office systems – excel, word and outlook (3, 4, 5*).

Desirable:

High and proven analytical, problem-solving and creative skills (3, 4, 5*).

Qualifications/Training

Desirable:

Relevant insurance industry qualification, or extensive and relevant experience at similar level (3, 4, 5*).

Other

Essential:

Team player – cooperative, flexible and adding value (3, 4*).

Track record of effective briefing at subordinate and superior level (3, 4, 5*).

Committed to continuous improvement in quality, timeliness and productivity (4*).

Flexible working (4*).

Working to, and achieving, deadlines (4, 5*).

Effective prioritisation (4, 5*).

Method of assessment*

1. Test prior to shortlist
2. Test after shortlist
3. Application form
4. Probing at interview
5. Documentary evidence

Job Description and Person Specification details:

Reviewed by: Accountancy Service Manager

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