



## Role Profile

<b>Job Title:</b> Assessment Officer	<b>Role Profile Number:</b> P/A
<b>Grade: L</b> <b>Salary:</b>	<b>Date Prepared:</b> March 2020
<b>Directorate/Group:</b> Housing	<b>Reporting to:</b> Lettings Customer Service Lead
<b>Structure Chart attached:</b>	No

### Job Purpose

Responsible for the assessment of housing applications in line with Swindon's Housing Allocations policy; carrying out checks to verify circumstances and eligibility prior to acceptance onto the Housing Register. To provide specialist advice and support to customers on the Choice Based Lettings scheme and assist vulnerable groups with accessing the service.

To maintain the Housing Register ensuring applications are updated with any change in circumstances and carrying out periodic reviews.

### Key Accountabilities

- To carry out relevant checks on housing applications to identify eligibility in line with Swindon's Housing Allocations policy; gathering information from the application and in-house database systems to establish any discrepancies and request any further information required for assessment purposes.
- To re-assess applications where there have been a change in circumstances and amend priority as necessary.
- To assist clients with accessing the service recognising equality and diversity needs ; advising on the application and bidding process and identifying vulnerable applicants who may need further assistance with the process.
- Obtaining pre-tenancy information including affordability assessments and establishing where a client may need further advice or help and if required, making referral to the Tenant Academy Team for advice and assistance in relation to budgeting, debt management, benefit advice or help with employment opportunities. Working with the Tenant Academy Team to ensure pre-tenancy assessment tools are explained and form part of the ongoing application process.
- To respond to telephone and on-line enquiries within service level agreements; giving explanation of the

Allocations policy and the Choice Based Lettings scheme and how this applies to a customer's application. To identify ways to improve the service by identifying lessons learnt from enquiries and making required changes to customer information.

- To identify and prioritise urgent applications; making necessary referrals to other services such as Social care services, homelessness prevention services and domestic abuse services.
- To contact Landlord and support agencies for information in relation to applications for housing.
- To identify clients with vulnerability and support needs and assist in the application or bidding process.
- To advertise Registered Social Landlord properties on the Housing Portal, carrying out necessary checks to ensure adverts are created correctly
- To provide support to Registered Social Landlords in enquiries relating to nominations, supporting partners with the IT module and to refer/log any issues with the IT module to IT support for action. Ensure partners are updated on progress and action any nominations requests within service level agreements.
- To assist Lettings Co-ordinators with the pre-assessment of applications that are coming close to shortlisting; carrying out verification checks as necessary to include an up-to-date affordability assessment.
- To review data held within Allocations IT module to ensure information correlates with data held within other sectors such as homelessness and tenancy information. To run reports for management as required.
- To maintain the Housing Register through a periodic review.
- To ensure lettings enquiries are responded to within service level agreements and correspondence is accurate in line with Swindon's Housing Allocations policy and processes.
- To provide cover in busy periods and absence of other Lettings Team officers.
- Provide support to the management team.

### **Supplementary Accountabilities**

- To participate in equality and diversity training, information briefings and events as and when required as part of continuous professional development
- To carry out all essential e-learning and attend any necessary training as directed by the Council.
- To promote equality and diversity best practices in all areas of work
- To participate in a rota to cover the service during office hours
- Ensure that any identified personal training needs are discussed with the immediate supervisor/Manager including being appraised in accordance with the Council's development and appraisal scheme and to undertake a programme of continuous development
- To meet with customers face to face when they visit the Council office to assist them with applying on-line or accessing the service
- To ensure that Data Protection policies are adhered to, safeguarding that disclosure of information is not

made to the person other than the data subject unless approval is given by the person or whereby there are relevant disclosures in place.

- In accordance with the provisions of Health & Safety, take reasonable care so as not to endanger yourself or other persons at work; co-operating with the Council to enable it to comply with its statutory duties for Health & Safety.
- Undertake any other duties that can be accommodated within the grading level of this post.

### **Knowledge & Experience**

*Candidates must have substantial knowledge and experience in the following areas of business and will be required to provide evidence of this:*

- Proven experience of working with customers face to face and over the telephone; being able to demonstrate excellent customer handling skills and dealing courteously and in a professional manner, speaking clearly and showing patience towards others; being able to gather information and give support and assistance.
- Good IT skills to include e-mail, Word, Excel and data entry; ensuring data is entered accurately
- Experience of working in a busy environment and working to tight deadlines
- Experience of working with and being able to use and understand written policy and procedures
- An understanding of the Data Protection Act and the safeguards against disclosing information to a person other than the data subject
- Experience of undertaking a range of different tasks, working on own initiative and working as part of a team and being able to move between tasks according to priority.
- Knowledge of housing policy is preferred but not essential for this post.

### **Qualifications**

- GCSE Grade C or equivalent in English and Maths
- Working towards or having a Housing professional qualification is preferred but not essential for this post.

### **Decision Making**

- Makes decisions on how to interpret and apply housing policy
- Referring urgent priority cases to management for discretionary/urgent approval or direct match
- Making decision to refer a client to the Homeless team to prevent homelessness
- Making decision to refer a case of domestic abuse cases to Domestic Abuse
- Prioritising applications for assessment where there is a high priority need or whereby applicants could be successful in social housing in the short term
- Referring cases to Social Care teams, Social Care Housing Lead or Managers due to vulnerability, medical or welfare need

- Referring cases to the Tenant Academy Team for pre-tenancy advice and/or assistance
- Referring cases to Manager for debt approval

**Creativity and Innovation**

- Presentation of communication documents for customers and partners

<p><b><u>Job Scope</u></b></p> <p><b>Number and types of jobs managed</b></p> <ul style="list-style-type: none"> <li>• None</li> <li>•</li> </ul> <p><b>Typical tasks supervised/allocated to others</b></p> <ul style="list-style-type: none"> <li>• None</li> <li>•</li> <li>•</li> </ul>	<p><b>Budget Holder</b></p> <p><b>Responsibility</b></p> <p><b>Asset Responsibility:</b></p>	<p>No</p> <p>.</p>
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**Contacts and Relationships**

- On a daily basis, the jobholder relates the circumstances of housing applicants to the Housing Allocations policy and procedures
- Refers cases to Homelessness service, Domestic Abuse Officers or supervisor/manager for further investigation/assessment
- Refers cases of possible medical/welfare need to Lettings Co-ordinators and Lettings Assistants
- Regular contact with Registered Social Landlord partners to ensure nominations are progressed in a timely manner and any refusals/withdrawals are processed or referred to Manager as necessary for a decision.
- Regular contact with other teams within Housing and Social Care to ensure information is gathered for assessment of housing applications; obtaining information on previous tenancies and debts to assess if eligible or if review is required with referral to management/supervisor.

**Values and Behaviours**

We strive to underpin our culture of being ‘At our Best’ through strong management and authentic leadership. This means getting the management basics right. We own and demonstrate accountability, both individually and collectively, and aim to get things right first time. Building on this we also expect everyone at SBC to demonstrate and live our organisational values and behaviours, by displaying:

- Accountability at all levels
- Customer care and pride in what we do

- Continuous learning and evaluation
- Valuing one another and the contribution each of us makes

**Other Key Features of the role**

Potential verbal abuse and aggression from customers.

<b>Employee Signature:</b>	Print Name:
<b>Date:</b>	
<b>Line Managers Signature:</b>	Print Name::
<b>Date:</b>	