



Children's Hospices Across Scotland



## JOB DESCRIPTION

### Financial Wellbeing and Energy Advice Team Administrator

#### Job Details

Job Title – **Financial wellbeing and energy advice team administrator**

Responsible to – **Financial wellbeing and energy advice coordinator**

Job Family – **Nursing and Family Support**

Location – **Rachel/Robin House**

Salary – Level B

#### Job Purpose

Working within the culture, ethos and philosophy of CHAS responsible for all aspects of administration for the financial wellbeing and energy advice team, ensuring an efficient and professional approach and that reporting to British Gas Energy Trust (BGET) and Scottish Gas Network (SGN) (funders of the team) is accurate and timely.

#### Organisational Position

The Family Support Team, is part of the CHAS outreach team, delivering holistic family centred palliative care and support to children with life shortening conditions and their families across Scotland. This is a diverse team made up of social workers, child and family workers, transition workers, activity facilitators and bereavement support. The financial wellbeing and energy advice team administrator is part of this multidisciplinary team.

The financial wellbeing and energy advice team administrator will be directly line managed and report to the financial wellbeing and energy advice coordinator.

#### Main Tasks

- Administrative and Clerical
- Administration of funds
- Information systems and reporting
- Data quality
- Research & Liaison with CHAS Family Support Team

## Job Activities

### Administrative and Clerical

- Lead on all aspects of administrative support provided to the financial wellbeing and energy advice team (including, but not limited to diary management, scanning, uploading of documents).
- Coordinate the planning and booking of all appointments for team members with families, ensuring that these are documented and recorded in electronic diaries and The Care Data Base.
- Lead on the creation of all required documents for the service e.g. letters, reports and spread sheets, ensuring compliance and branding with CHAS, BGET and SGN.
- Carry out data input and administration tasks involved in implementing and managing a computerised database to maintain computer based/paper systems and produce reports as necessary.
- Setting up systems and supporting the coordinator to ensure all open caseloads are reviewed on a regular basis and appropriate action taken to refer on to other members of the family support team if necessary, or that they are closed to the relevant team member.
- Undertake follow up survey with families three months after their initial contact with the financial wellbeing and energy advice team, ensuring that the necessary questions are completed and documented for reporting to BGET and SGN.
- Completing applications for grants, and funding applications on behalf of the financial wellbeing and energy advice team, monitoring the outcome and feeding back to the team.

### Administration of funds

- Works closely with the financial wellbeing and energy advice team, as well as family members to sensitively establish what energy efficient equipment would be most beneficial to them within the budget available.
- Work in collaboration with the financial wellbeing and energy advice coordinator to make day to day decisions on ensuring the best possible stewardship of BGET and SGN funds.
- Administer BGET and SGN funds to purchase energy efficient equipment for families in need, keeping accurate records and updating The Care Data Base, BGET and SGN accordingly.
- Provide monthly reports to the financial wellbeing and energy advice coordinator around totals spent from the BGET and SGN funds.
- Provide advice to the financial wellbeing and energy advice team on CHAS policy for procurement in liaison with Hospice Administration Team.
- Processes invoices for authorisation by relevant team leaders/managers, ensuring compliance with Proactis system and finance processes.
- Scan relevant copies of documents into e-files and forward paperwork to Finance team.

### Information Systems and Reporting

- Responsible for the day to day management of data relating to financial wellbeing and energy advice, ensuring that this is captured accurately
- Develop and populate spreadsheets to accurately input financial gains for families, which are then reported internally and externally to BGET and SGN.

- Carry out data input and administration tasks involved in implementing and managing a computerised database to maintain computer based/paper systems, and produce reports as necessary.
- Use knowledge of systems and environment to make decisions required to carry out duties (e.g. transferring existing data between the system used by the financial wellbeing and energy advice team and any reporting templates, making any necessary adjustments).
- Work with the financial wellbeing and energy advice coordinator and, as required, other colleagues to compile and analyse robust statistical reports for BGET, SGN and CHAS, ensuring that performance against key performance indicators are captured
- Develop monthly and quarterly reports, which accurately capture the various pieces of work undertaken by the team, ensuring that they are submitted to BGET and SGN within the agreed timeframe

### **Data Quality**

- Works in collaboration with the data base coordinator to ensure that all data on income maximisation and energy advice is captured accurately within The Care Data Base.
- Maintain data standards, ensuring that all data input is accurate, consistent, timely and adheres to best practice
- Run specific caseload reports and queries as required,
- Develop new data reports as and when requested
- Identify creative ways to share data reports within CHAS, BGET and SGN.
- Leads the regular review of all data being captured for the project to assess and identify missing or inaccurate data and offers solutions to remedy
- Work to identify any faults or issues which compromise data or reporting integrity

### **Research & Liaison**

- Maintaining Information Technology policy when researching links to external websites to assist in securing funding for families, or processing payments
- Maintaining GDPR regulations in the protection of information regarding CHAS families, when conducting research into eligible families.
- Liaise with Information Governance in this tasking to ensure that all CHAS policies in this area are being adhered to.

### **Health and Safety**

- Responsible for complying with the CHAS Health and Safety Management Policy and associated procedures and co-operate with CHAS in complying with its legal duties

### **Information Governance**

- Responsible for complying with the CHAS Information Governance Framework and associated policies and co-operate with CHAS in complying with its legal duties.

### **Volunteer Engagement**

- Work alongside volunteers and actively support their work by providing advice and information to help them in their roles.

### **Risk Management**

- The post holder is responsible for the monitoring and prevention of operational day to day business risks arising within their area of responsibility, ensuring that the

appropriate risk register is maintained and reported in line with the organisation's framework for Risk Management

## Dimensions

- The post is line managed by the financial wellbeing and energy advice coordinator and provides administration support to the financial wellbeing and energy advice team.
- In performing this role, the post holder frequently has contact with the Family Support Team, Administration Assistants, babies, children and young people with life shortening conditions, their families, other CHAS Staff, and volunteers.
- Attends, and actively contributes to, regular financial wellbeing and energy advice meetings, family support team meetings and has involvement with Fundraising and Communications teams as required
- Has frequent contact with the CHAS trusts and foundations manager
- Inputs into the process of developing, implementing and maintaining policies, procedures, standards and protocols for own area of work
- Has delegated responsibility for decisions around spend of BGET and SGN funds for non-consumables within the agreed delegation framework

## Decisions and Communications

### Decisions

- Works with a degree of autonomy within the clearly defined policies, protocols, procedures and codes of conduct of the organisation, and the agreed management structure of CHAS
- Work is structured and overseen by the financial wellbeing and energy advice coordinator, but there is a requirement to work autonomously to prioritise workload
- The post-holder will, on a daily basis, have to process and respond to complex and sensitive information and will have to communicate clearly and at times assertively with internal and external stakeholders
- Develops and maintains relationships with CHAS staff, supporters, families, peers in other charities, BGET and SGN to ensure effective and efficient administration function
- Maintains close working relationships both internally and externally ensuring the delivery of a highly effective administration function

### Communications

- Frequently has contact with families who have a child with a life shortening condition
- Input into numerous CHAS wide databases
- Works as part of a multi professional team of health and social care staff, fundraising and volunteers

## Special Conditions

### Physical Effort

- Long periods of time working on a computer or laptop
- Manual handling when receiving deliveries.
- Occasional requirement to travel between Sites.

### Mental Effort

- Frequent requirement for high levels of concentration when dealing with administrative tasks, where there are frequent interruptions to the normal pattern of work
- A need to respond quickly and efficiently to requests for data and written information.
- Need to manage competing workload priorities and multiple differing aspects of the work
- Dealing with complex and highly sensitive information.

### Emotional Effort

- Need to act diplomatically especially when working to conflicting priorities and tight deadlines.
- Frequently exposed to emotional or distressing circumstances, whilst working with the families of children or young people with life shortening conditions.

### Equipment and systems

- On a daily basis, is required to use the following equipment: computer/ laptop, Microsoft Teams based Telephone System, photocopier, scanner, analogue and digital dictation equipment, Franking Machine, Door Key Entry Card production system and Clever Touch Smartboard.
- Maintenance, input and interrogation of confidential information on The Care Database, Microsoft Teams based Communication System, Microsoft Suite of packages such as Excel, Publisher, Word, Outlook, Access, and My CHAS Cascade based HR System.

### Working Conditions

- Required to use the computer, more or less continuously, on most days.
- Will need to use Microsoft Teams to communicate every day.

## Most Challenging/Difficult Aspects of the Post

This is a two year project funded by BGET and SGN (with 9 months remaining). The post holder will frequently be required to prioritise their workload to ensure that reporting for BGET and SGN is completed to the required timescales. This requires input from various colleagues within CHAS, and may at times be difficult to negotiate

At times this will be challenging when competing with frequent exposure to families who have a child with a life shortening condition, and who face financial hardship



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## PERSON SPECIFICATION

### Financial Wellbeing and Energy Advice Team Administrator

#### Education, Qualifications, and Training

##### Essential

- Educated to HND level or equivalent in Administration or related discipline equivalent, or significant experience in a similar role

Method of Assessment – Application Form

#### Skills, Abilities, and Knowledge

##### Essential

- Demonstrable knowledge of administrative practices and procedures
- Demonstrable working knowledge of the Microsoft Office suite packages including Outlook, Word, Excel and PowerPoint Developed planning and organisational skills
- Ability to work effectively as part of a team
- Exceptional communication skills required to engage staff, volunteers and families, and external organisations (including BGET and SGN) in an appropriate and effective manner
- High level of accuracy and numeracy skills as the role requires daily analysis of complex financial information, maintenance of case notes and database records and clear communication verbally and in writing to professional audiences
- Planning and organisational skills required for managing caseloads and other activity
- Ability to prioritise and manage own workload and work on own initiative.
- Highly developed oral and written communication skills
- A calm, logical and methodical approach, often working under pressure to tight deadlines

Method of Assessment – Application Form and Interview

#### Experience

##### Essential

- Proven experience of working in a busy administration role and being responsible for own workload
- Experience of diary management and travel planning
- Experience of collating data and working to tight reporting time scales
- Experience of Customer Service in a forward facing environment
- Experience of working as part of a multi professional team

##### Desirable

- Experience of working with families who are experiencing financial hardship or crisis

Method of Assessment – Application Form and Interview

## Personal Qualities

### Essential

- Resourceful and enterprising, with a positive attitude to challenges and change
- Ability to work closely with volunteers and to recognise their contribution
- Commitment to core vision and values of CHAS
- Friendly and outgoing with the ability to interact positively with people at all levels
- A commitment to providing an excellent customer service experience for all end users

### Desirable

- Empathetic

Method of Assessment – Interview

## Other Requirements

### Essential

- Willingness to travel between CHAS sites if required

Method of Assessment – Application Form and Interview