

# TRANSPORT AND ALLOWANCES OFFICER

## Role Profile



<b>Title</b>	Transport and Allowances Officer	
<b>Grade</b>	GRADE C	
<b>Reference:</b>	N1067	
<b>Reports to:</b>	Team Leader	
<b>Work style Definition</b>	Office based hot-desk/touch down worker	
<b>Job Type:</b>	Customer Facing Worker	
<b>Primary purpose of role</b>	To provide administrative and customer focused support for the School Transport & Allowances Team, ensuring that all services provided to colleagues, managers and customers are efficient and effective.	
<b>Key accountabilities and key measures</b>	<b>Role outcomes</b> <ul style="list-style-type: none"> <li>▪ Undertake HR administration for the Passenger Assistants ensuring appropriate resources are in place to support delivery of the service in conjunction with the Transport Officer responsible for managing Passenger Assistants (20%)</li> <li>▪ Process applications and undertake eligibility checks for free school meals to ensure children have timely access to their meals (15%)</li> <li>▪ Undertake ID check and add information to systems for school transport driver DBS checks and issuing of school driver ID badges (5%)</li> <li>▪ Undertake administration for the service ensuring accurate, up-to-date information is available to management (20%)</li> <li>▪ Implement day to day changes as advised by parents, schools, tutors etc. and</li> </ul>	<b>Role measures</b> <ul style="list-style-type: none"> <li>▪ Authorising time sheets, unpaid leave and sickness processed in accordance with strict payroll deadlines.</li> <li>▪ DBS checks processed to ensure compliance with safeguarding policy.</li> <li>▪ Organising Relief PA cover, maintaining records &amp; keeping up to date. Ensuring all routes are suitably covered with appropriate PA for sickness &amp; other absence.</li> <li>▪ Accurate authorisation &amp; recording of pupils entitled to free school meals &amp; holiday Allowances.</li> <li>▪ Encourage take up of free school meals &amp; other Allowances.</li> <li>▪ All invoices reviewed &amp; payments to operators made within agreed times.</li> <li>▪ All financial discrepancies reviewed &amp; information compiled for further action to be taken.</li> </ul>

	<p>inform operators and passenger assistants of changes to procured transport route in conjunction with the Transport Officer responsible for procurement (20%)</p> <ul style="list-style-type: none"> <li>Act as a reliable point of contact for the public, school staff, other staff within the LA offering advice and guidance on all school transport and free school matters (20%)</li> </ul>	<ul style="list-style-type: none"> <li>Ordering &amp; checking receipt of equipment and processing payments on Spend Management system.</li> <li>Invoices generated in a timely manner</li> <li>New routes set up &amp; existing routes maintained within policy guideline timescales.</li> <li>Maintain accurate databases for equipment and term dates.</li> <li>To cover service on a rota basis from 7.00 am to 5.00 pm</li> <li>ID and DBS checks processed quickly to ensure operators have sufficient authorised drivers.</li> </ul>
<b>Key activities</b>	<ul style="list-style-type: none"> <li>Scanning/filing; answer telephone calls; process free bus passes; prepare correspondence; complete documentation to follow up operational and contractual arrangements; produce and send letters, emails and tender documents (20%)</li> <li>Issue changes to contracts and action payroll changes to maintain accurate records (10%)</li> <li>Arrange cover for absences and monitor route changes to ensure efficiency (10%)</li> <li>Assess and authorise claims for free school meals and process renewals (10%)</li> <li>Verify and implement monthly contract payments and process invoices to value £2m annually in accordance with contract terms and financial procedures (10%)</li> <li>Assist Transport Officers to setup new taxi and minibus routes and changes to existing routes; arrange issuing of car seats and other equipment and maintain equipment database (10%)</li> <li>Set up or terminate accounts; record miscellaneous invoices; monitor requisition and invoice expenditure (5%)</li> <li>Check budget statements and report on variances, liaise with finance team on guidelines (5%)</li> <li>Verify timesheets, unpaid and sick leave claims to facilitate accurate payments to staff (4%)</li> <li>Arrange interviews and training for new Passenger Assistants, and process DBS applications to ensure adequate availability as required by schools (2%)</li> </ul>	

	<ul style="list-style-type: none"> <li>▪ Update finance details and produce management reports to aid decision making by management (2%)</li> <li>▪ Administer DBS checks for taxi and minibus drivers (2%)</li> <li>▪ Manage customer accounts and raise invoices for concessionary travel (2%)</li> <li>▪ Deputise for Transport Officers as and when required to ensure provision of service (2%)</li> <li>▪ Ensure allocation of safety equipment to routes (2%)</li> <li>▪ Maintain school term dates spreadsheet (2%)</li> <li>▪ Proactively provide suggestions to the team on measures to improve the service in terms of efficiency, customer experience and best practice – supporting a continuous improvement ethos (2%)</li> <li>▪ Undertake other duties as directed and commensurate with the grading of the role</li> </ul>
<b>Essential qualifications/ knowledge</b>	<ul style="list-style-type: none"> <li>▪ GCSE's A*- C (9-4) or equivalent in English and Maths</li> <li>▪ A willingness to undertake appropriate learning and development as required</li> </ul>
<b>Desirable qualifications/ knowledge</b>	<ul style="list-style-type: none"> <li>▪ NVQ Level 2 or 3</li> <li>▪ Customer care qualification/training</li> <li>▪ Basic knowledge of relevant legislation, policies and procedures</li> <li>▪ Understanding of school transport issues</li> </ul>
<b>Essential experience</b>	<ul style="list-style-type: none"> <li>▪ Experience of using Microsoft Software Packages e.g. Word, Excel, Outlook.</li> <li>▪ Experience of giving information and signposting customers in a tactful and professional manner face to face, over the phone, online and in writing.</li> <li>▪ Experience of providing an effective and efficient business support service to customers.</li> <li>▪ Administrative experience with an understanding of office procedures.</li> <li>▪ Experience of prioritising own workload to ensure deadlines are met.</li> <li>▪ Experience of maintaining documents, records and data e.g. financial records, customer records or accounts.</li> </ul>
<b>Desirable experience</b>	<ul style="list-style-type: none"> <li>▪ Experience of working on process improvements</li> <li>▪ Experience of manipulating computer-based data in order to produce management information</li> <li>▪ Experience of using Capita ONE EMS databases</li> </ul>

<b>Essential skills</b>	<ul style="list-style-type: none"> <li>▪ Ability to take ownership of issues and see through to a resolution for customers, keeping them informed as required.</li> <li>▪ Ability to process basic service requests.</li> <li>▪ Customer care skills and the ability to show initiative when dealing with customer enquiries.</li> <li>▪ Communication skills to provide information and signpost customers, some with specific communication needs, when dealing with their enquiries and complaints.</li> <li>▪ Numeracy skills required for carrying out calculations and ensuring the accuracy of data.</li> <li>▪ Literacy skills required including spelling, grammar and punctuation for dealing with letters, documents.</li> <li>▪ Ability to be decisive and make criteria based decisions - weighing up evidence against set criteria.</li> <li>▪ Team working skills and the ability to work together with colleagues to deliver a cohesive, joined-up service to customers.</li> <li>▪ Time management skills to prioritise work appropriately, be punctual and meet deadlines in order to deliver a good service.</li> <li>▪ Accuracy with a high level of attention to detail</li> </ul>
<b>Corporate standards</b> <ul style="list-style-type: none"> <li>▪ In accordance with Council policies and guidance on information management and security, it is your personal responsibility for data protection, client confidentiality and information governance.</li> <li>▪ Act at all times in accordance with appropriate legislation and regulations, codes of practice, the provisions of the Council's constitution and its policies and procedures.</li> <li>▪ Work within the requirements of the Council's Health and Safety policy, performance standards, safe systems of work and procedures.</li> <li>▪ Undertake all duties with due regard to the corporate equalities policy and relevant legislation.</li> </ul>	