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|---------------------|--------------------------------|-------------------------|------------------------|
| <b>Post:</b>        | Service Charge Liaison Advisor | <b>Grade:</b>           | PO2                    |
| <b>Directorate:</b> | Finance                        | <b>Responsible to:</b>  | Head of Service Charge |
| <b>Team:</b>        | Service Charges                | <b>Responsible for:</b> | N/A                    |

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## Purpose of Job

To act as the first point of contact for residents, providing clear, accurate, and timely responses to service charge enquiries and disputes, while supporting the wider team in resolving issues and improving customer understanding.

## Main Duties and Responsibilities

### Resident Enquiries

1. Respond to resident queries on service charges via phone, email, and written correspondence
2. Explain service charge budgets, actuals, and variances in a clear, accessible way
3. Provide accurate breakdowns of charges and support residents to understand costs
4. Identify at-risk residents and ensure that they are provided with appropriate support and advice
5. Meet with residents at home, in the office or in other appropriate venues
6. Plan, attend and follow-up enquiries from resident meetings and forum
7. Engage with leaseholder forums such as Estate Boards, Resident Associations, surgeries, and statutory and non-statutory consultations
8. Ensure all enquiries are answered promptly to ensure a high level of customer care is maintained

### Case Management

9. Manage a caseload of service charge enquiries and disputes through to resolution
10. Log, track, and update cases within systems
11. Ensure casework meets legislative, regulatory and policy requirement
12. Respond to enquiries within statutory timeframes
13. Escalate complex or high-risk cases to Analysts or Specialist roles
14. Escalate cases and work with Service Charge Collections team when required
15. Effective information management, including sharing information in accordance with agreed protocols
16. Evidence based recommendations are actioned
17. Protect analysts' technical capacity through structured case management

### Complaint Handling

18. Support responses to stage 1 complaints relating to service charges
19. Ensure responses are clear, empathetic, and solution-focused

20. Identify recurring issues and feedback to improve services

### **Support to Service Charge Team**

- 21. Work closely with Analysts to gather information and resolve queries
- 22. Assist with data validation and checking where needed
- 23. Effective coordination between Finance, Ops and Development teams
- 24. Support communication of annual estimates and actuals to residents
- 25. Administrative support for delivery of Section 20 consultations and communications

### **Continuous Improvement**

- 26. Identify common themes in enquiries and suggest improvements
- 27. Contribute to improving letters, FAQs, and resident communications
- 28. Support digital/self-service improvements (e.g. portal clarity)

### **General**

Perform other duties as may be reasonably required by your line manager.

Conduct yourself in line with Poplar HARCA's policies, procedures, rules and standards.

Undertake out of hours work when required.

## Person Specification

**Post:** Service Charge Liaison Advisor

**Grade:** PO2

**Team:** Service Charge Team

**Directorate:** Finance

All criteria are essential unless stated otherwise.

| Requirements                                 | Criteria                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Education/<br>Qualifications/<br>Training | a. GCSE English and Maths; or comparable/equivalent qualifications/ experience                                                                                                                                                                                                                                                                                                                                                                        |
| 2. Skills                                    | Can:<br>a. Engage in straight-talking<br>b. Facilitate meetings, groups and forums<br>c. Improve performance<br>d. Use technology proficiently<br>e. Use written and oral skills to influence, negotiate and persuade<br>f. Work effectively with peers, partners and others                                                                                                                                                                          |
| 3. Experience                                | Has:<br>a. Applied legislation, regulatory guidance, policies and procedures<br>b. Delivered in a complex environment<br>c. Met deadlines in a fast-paced, high-pressure environment<br>d. Experience in a customer-facing role (housing preferred)<br>e. Strong communication skills – able to explain complex information simply<br>f. Good attention to detail and organisational skills<br>g. Ability to manage multiple cases and meet deadlines |
| 4. Knowledge                                 | How to:<br>a. Basic understanding of service charges (or willingness to learn quickly)<br>b. Apply legislation, regulation, best practice and legal precedents related to leasehold and service charges<br>c. Interpret a lease<br>d. Maintain appropriate systems and procedures<br>e. Present information in an appropriate format to a variety of audiences<br>f. Work in and with diverse communities                                             |
| 5. Key<br>Competencies                       | a. Putting others first<br>b. Achieving Results<br>c. Open to change<br>d. Informed and informing<br>e. Personal Progress<br>f. Partnership Working<br>g. Problem Solving                                                                                                                                                                                                                                                                             |