



JOB DESCRIPTION

Job Title	Recovery, Revenues and Welfare Officer – Visiting Officer		
Directorate	Finance and Procurement		
Reporting to	Recovery, Revenues and Welfare Senior Officer – Council Tax and NDR Senior Officers		
Grade	12		
Evaluation ref:	TR0310	Job Family ref:	
Role Purpose			
<p>The post holder is responsible for interpreting a variety of primary legislation covering different areas of law (The Local Govt. Finance Acts of 1989 and 1992 and The Housing Benefit Regulations 2006) and supporting legislation, statutory instruments, Government Guidance, local policy, and case law to make decisions on liability, the award of discounts, reliefs and exemptions, the assessment of benefit applications, discretionary awards and maintaining property valuation records.</p> <p>The role will be required to carry out inspections and visits across the authority area to verify liability, occupancy, and property details for Council Tax and Non-Domestic Rates (NDR). The postholder will ensure accurate billing and compliance with legislation by gathering evidence, issuing completion notices, updating records, and supporting enforcement and recovery processes. Ad-hoc visits on behalf of the service in other areas, such as welfare, may be required under instruction from the relevant team/manager. The role requires high levels of autonomy, judgment and stakeholder engagement, including lone working in complex and sensitive environments.</p>			
Accountabilities			
<i>Council Tax and NDR</i>			
<ul style="list-style-type: none">• To make independent determinations in relation to liability and the award of discounts and exemptions, in accordance with the provisions of the Local Govt. Finance act 1992 and associated statutory instruments, case law, and local policies and particularly in relation to rateable / chargeable occupation, empty properties, the applicability of relevant reliefs etc.,.• Assessing applications and making recommendations in respect of applications for discretionary awards under the Section 13A 1(c) provisions and our local policy as well as applications for hardship relief under Section 49 of the Local Government Finance 1988 Act and in accordance with our Discretionary Rate Relief Policy.. This includes assessing income and expenditure, making a judgement and recommendation which balances the needs of the individual Council Tax payer against the wider interests of Council Tax payers in general.			

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- Processing and actioning the Council Tax Valuation list changes received from the Valuation Office Agency, including reconciliation of the list against our database. Ensuring that we have maximised our tax base and are monitoring for new growth as well as determining the calculation of Interest where appropriate for NDR.
- Working in conjunction with the other Revenues and Welfare services to reduce Council Tax arrears, increase in-year collection and prevent / reduce cases being taken through the recovery route by the Recovery Team. Work with the Recovery Team will also be required to support cases through the liability order/ recovery route.

General

- Often dealing with vulnerable & potentially challenging customers in difficult or complex situations. Ensuring that engagement is made with third party organisations where required e.g. DWP, Citizens Advice, Age Concern, solicitors & internal stakeholders, such as Housing, working together to find solutions in individual cases.
- Dealing with customers personal details such as Bank account information to set up Direct Debits, make Bacs payments for Housing Benefit and credits due to back to the customer, with adherence to the relevant processing policies and regulations. This will include being pro-active and vigilant for fraudulent applications, and to refer any suspect cases through the correct process. This will include working through initiatives such as the National Fraud Initiative (NFI.)
- Dealing with all types of insolvency cases and where applicable identifying amounts to claim on behalf of the Council. Helping customers who are subject to insolvency understand what is due.
- Dealing with complaints in a timely, professional manner, to achieve the right outcome for the Customer and the Council.

Stakeholder Engagement

- The post holder will interact with Council Tax payers, benefit claimants, Business Rate payers, landlords, advice agencies, , solicitors, letting agents, the Valuation Office Agency, the Magistrates Courts, Enforcement Agents, tracing agencies, charities and the voluntary sector and other council services such as planning to obtain information, enforce payment, assess claims and / or resolve individual cases.

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Project Work

- Assist in one off projects, liaise with team leaders, managers, and stakeholders, working in partnership to achieve specific objectives, eg contribute to process solutions and technical input to initiatives and changes in legislation.

Regulation / Statutory Compliance

- Whilst making decisions on individual cases balance compliance with the different areas of legislation, case law and local policy, the wider interests of claimants, Council Tax and Business Rate payers in general against those of the individual claimant, Council Tax or Business Rate payer.

Property Inspections & Evidence Gathering

- The role will conduct visits to residential and commercial properties to:
 - Confirm occupancy status and liable parties
 - Identify changes affecting Council Tax or NDR liability
 - Verify exemptions, discounts, and reliefs

and subsequently record and report findings accurately using mobile technology and internal systems, identifying and escalating cases with potential fraud or policy breaches. The role will need to be able to work as a lone worker, in line with the relevant Council policy, using the available health and safety tools, including correct use of PPE, along with managing own time, maximising time and efficient route planning for visits.

Knowledge / Experience / Skills / Qualifications

	Essential	Desirable
Knowledge		
Extensive knowledge and understanding of Revenues and / or Benefits legislation, Financial and Recovery Legislation, regulations & processes, their context and impact within local government.	X	
In-depth understanding of property valuation principles and their impact on Council Tax and NDR liability	X	
A broad and detailed knowledge of Council services systems and procedures.		X

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Experience		
Strong level of experience of being a lone worker and using tools and recording mechanisms to safely carry out visits and inspection and take responsibility for personal safety.	X	
Experience in property inspection or field-based roles, including data gathering and reporting for enforcement and/or compliance purposes.	X	
Knowledge of VOA processes and property valuation principles.	X	
Worked within a fast-paced customer facing environment dealing with complex and/or sensitive enquiries.	X	
Extensive experience in Revenues, Welfare and Benefits within a local authority setting.	X	
Managing conflicting priorities.	X	
Experience of working with external agencies, including government agencies, solicitors etc.		X
Demonstrable experience of providing advice and support to others.		X
Qualifications / Registrations / Certifications		
5 GCSE (or equivalent) at Grade 4/C or above including English and Maths, qualified by strong relevant experience.	X	
IRRV qualification or equivalent.		X
Full Driver's Licence with no endorsements.	X	
Safeguarding Training (Level 1 or 2).	X	
Conflict Resolution or De-escalation Training.	X	
Health & Safety / Lone Working Certification.	X	



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Skills		
Ability to manage competing priorities and deliver outcomes in a fast-paced environment, along with abilities in route planning and time management to maximise field efficiency and coverage.	X	
Responds to written, oral, and telephone contact courteously and helpfully, providing relevant information and advice, referring on or progressing as appropriate.	X	
Excellent analytical, problem-solving, and communication skills.	X	
Actively listens, seeks clarification as necessary and checks understanding.	X	
Has empathy and due regard to the needs of the customer.	X	
Confident IT Skills.	X	
Communicates effectively, both orally and in writing, with people at all levels, respecting confidentiality.	X	
Demonstrates working knowledge of relevant software packages e.g. The Revenues & Welfare (Benefits) database, Electronic Data Management system and workflow, communicating technical advice in an appropriate manner for the recipient.	X	
Can demonstrate a high level of accuracy in their work.	X	
Able to work effectively as part of a team and on own initiative.	X	
Willing to learn from others and seek assistance as appropriate, whilst taking responsibility for own work.	X	
Managing a demanding workload and meeting deadlines.	X	
Ability to identify and initiate areas of work requiring service improvement.		X
Adopts a systematic approach when solving problems – suggests and/or implements straightforward solutions.		X

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Advanced observational and analytical skills to assess property status and occupancy with limited information	X	
Working Conditions		
<p>This role involves working within a dynamic and supportive local authority environment. Candidates should be prepared for the following conditions:</p> <ul style="list-style-type: none"> • Work Hours: Standard working hours are 37, with occasional requirements for evening or weekend work to meet project deadlines or attend community events. • Location: The work location will be based at one of Somerset Council's offices, to be decided upon offer of position, with opportunities for remote working as per organisational policies. The position will also require off-site working. • Travel: Travel within the local area will be required for site visits, residential visits and ad-hoc meetings and community engagement activities. • Work Environment: The role involves working both independently and as part of a team, with access to modern office facilities and resources. • Health and Safety: Adherence to all health and safety regulations is mandatory, ensuring a safe working environment for all employees and adhering to Somerset Council's Lone Working policy. 		
Dimensions of the role		
Working Arrangements		
<i>Somerset Council's Dynamic Working Strategy will be applied to this position.</i>		
Corporate Accountabilities		
<p>Understand, uphold, and promote the aims of the council's equality, diversity, and inclusion policies; health, safety and wellbeing of self and others; and Organisational values in everything you do. Equality and Diversity practice covers both interaction with staff, service users and communities and includes challenging discrimination and promoting equality of opportunity for all.</p>		

Date: 23/10/2025