

JOB DESCRIPTION

SECTION 1

Basic data

Job Holder:		Job Title:	Financial Education Operations Officer
Reports to:	Manager, Financial Education Operations	Job Location:	Canterbury
Department:	Learning Provision	Job Family:	Support

SECTION 2

DEPARTMENT STRUCTURE

Please see Appendix A attached.

SECTION 3

OVERALL JOB PURPOSE

The Financial Education Operations Officers are responsible for liaising with and fulfilling service requests related to qualifications delivered in Schools, Colleges and other Financial Education Centres. Covering the entire process from registration to certification.

SECTION 4

PRINCIPAL ACTIVITIES/OUTPUT OF JOB

- Handle all incoming Financial Education enquiries, via telephone, email or post in a professional and timely manner, aiming to satisfy the enquiry at the first point where possible.
- Ensure that registrations and other services from those centres delivering Financial Education qualifications are processed accurately and in line with service levels agreements
- Ensure that all processing of personal data complies with the principles of the relevant data protection law, escalating data protection queries to the Financial Education Manager as quickly as possible.
- Ensure communications with the Examinations Officers are accurate, consistent and that the enquiries are handled appropriately
- Maintain a high level of knowledge about all of our Financial Education products and services.
- Support the use of LIBF e-test by Financial Education centres, appreciating the different nature of enquiries. Respond to and maintain records of non-technical queries and escalate technical queries to IT helpdesk.
- Manage non-standard delivery of Financial Education qualifications
- Fulfil assessment requirements related to areas such as examination packing, checking, dispatch, return, tracking, scanning, marking process, checking and release of results.

- Ensure the conduct of examinations requirements are strictly adhered to
- Record and publish student results in a timely and secure manner and in line with published service levels
- Manage the approval and removal of access to course websites for new and current centres, working collaboratively with Relationship Managers
- Prepare and distribute replacement certificates in a secure manner and in line with service levels and regulations
- Fulfil requests from schools for the return of examination scripts in line with published service levels
- Ensure responses to result enquiries are in line with published service levels
- Attend Centre Monitoring visits and inspections of Financial Education centres
- Work collaboratively with other team members within the Operations department and the Relationship Team
- Maintain important documents via proofreading and updating these to the website/relevant course website
- Identify and support the implementation of improvements to services
- Share knowledge and good practice with other members of the Operations department at all levels
- Undertake such other activities that may be reasonably requested

CONTACTS AND INFLUENCE EXERCISED

The nature of this role has the potential to influence the reputation of this organisation as it is usually the first point of contact. This role has a wide range of contacts at all levels within the organisation and with examinations officers.

DECISIONS

Indicate the level which best describes the job holder’s involvement in the decision making process:

Follows written and verbal instructions and established guidelines	X
Interprets policies & procedures	X
Participates in the establishment of guidelines & procedures	
Acts as final authority to implement policy, guidelines and procedures that affect strategic goals	
Acts as final authority to approve policy, guidelines and procedures that affect strategic goals	

Indicate the statement which best describes the impact of the job holder’s decisions:

Restricted to employee’s own work	X
Has impact on department/directorate* objectives	X
Has impact on The London Institute of Banking & Finance / ProShare objectives	

PERSON SPECIFICATION

Qualifications, knowledge and professional memberships	Essential / Desirable?	
English Language and Mathematics GCSE (grade C or above)	Essential	
Educated to degree level	Desirable	
Knowledge of the schools sector and the challenges of working in that environment	Desirable	
Thorough knowledge of The London Institute of Banking & Finance strategy, qualifications and business activities	Desirable	
Technical competencies (skills and experience)	Essential / Desirable?	
Ability to react positively to changing priorities	Essential	
Ability to manage own time driven schedules	Essential	
Strong organisational and administrative skills	Essential	
Working knowledge of Microsoft Office	Essential	
Excellent communication skills appropriate to the audience and method of communication	Essential	
Keen eye for detail and level of accuracy	Essential	
Ability to assess the operational impact of regulations and policies	Desirable	
Interest in training and developing self	Desirable	
Core Competencies (this section should contain the level of competency required to carry out this role. Please refer to the competency framework for clarification where needed. Placing a N/A where the competency is not required as part of the job)	Essential / desirable?	Core for all employees
Values		
Collaboration	E	C
Adaptability	E	C
Innovation	E	C
Integrity	E	C
Support	E	C
Skills and Experience	Essential / desirable?	Core or Enhanced
Communicating effectively	E	C
Business thinking	E	En
Developing Yourself	E	C
Getting things done to achieve results	E	En
Digital Capability	E	C
The Customer Experience	E	En
Managing quality and standards	E	En
Applying judgement and taking decisions	E	En

Signed
JOB HOLDER

Date

Signed
LINE MANAGER

Date

Appendix A

