



Whole Again Communities CIC 8704098

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**European Union**  
European Structural  
and Investment Funds

## CLAIMS AND COMPLIANCE CO-ORDINATOR JOB DESCRIPTION

**SERVICE:** Skills Development

**SECTION:** Whole Again Communities CIC (WAC)

**LOCATION:** Penzance

**JOB TITLE:** Claims and Compliance Co-ordinator  
(Post identified as requiring Basic level DBS Disclosure)

**RESPONSIBLE TO:** CEO

**FUNDED BY:** European Regional Development Fund (ERDF), Cornwall Council

**SALARY RANGE:** £5,000.00 per year (£24,999.99 pro rata)

**JOB TYPE:** 0.2 FTE Fixed Term Position

**START DATE:** 25/07/2022

**END DATE:** 31/03/2023

**SUPERVISORY RESPONSIBILITY:** None

### KEY RELATIONSHIPS:

**Internal:** WAC PROJECT MANAGEMENT TEAM:  
WAC Financial Manager  
WAC Office Manager  
WAC HR Manager  
WAC Executive Consultant

**External:** Building Supervisor/Contractor (to be confirmed)  
Managing Authorities and Government Departments  
Cornwall Council  
Local Housing Association (LiveWest)  
Potentially Highways England

## **MAIN PURPOSE OF THE JOB:**

To ensure the provision of an effective project grant claiming for the WAC New Build Project, which is funded by the ERDF.

To support the contractor and Project Management Team to ensure compliant processes are adhered to in relation to financial claims and output submission process and procedures.

To assist with the preparation and related activity for external audits and project visits for all grant funded activity.

## **KEY TASKS:**

### **Service delivery**

- To be responsible for assisting with the delivery of the WAC New Build Project, to include collating grant claims and issuing contractor claim payments as required, all within grant funding regulations and timescales.
- To be responsible for review, collation and submission of the WAC New Build Project interim and final grant claim, accompanying progress reports and transaction listings, all within grant funding regulations and timescales. Liaising with funders and auditors, as appropriate.
- To assist in ensuring that relevant project areas of the Company/Project website are maintained.
- To support the contractor and Project Management Team where applicable, to ensure common pro-formas and templates are established and used across the project.
- To provide advice and support to the WAC Finance and Compliance Manager, Project Management Team and Contract Manager to ensure claims and monitoring is undertaken on a regular basis. Liaising with contractors, Project Management Team, funders and auditors, as appropriate.
- To ensure the provision of occasional and appropriate administrative support as required across the services/site.
- To establish and maintain a consistent service file management system and protocols
- To co-ordinate dissemination of time critical new information on an ad hoc basis to relevant individuals/groups/services within the company

### **Relationship management**

- To develop and preserve good working relationships throughout the supply chain with the contractor and Project Management Team, promoting an atmosphere and culture of common goals, confidentiality and trust.

### **Service development**

- To contribute to the development of project procedures in relation to the generation of eligible procurement, staff expenses and other expenditure to ensure all claimed expenditure is incurred and collated within grant funding regulations.

- To contribute to the development and implementation of systems to monitor key project outputs for monitoring purposes and maintain the audit system necessary for European and other funds, as required by the grant funding agencies
- To identify and recommend solutions to problems affecting the quality and compliance of the contract where appropriate.

### **Technical**

- To provide support and advice to project staff in respect of WAC policies and processes relevant to ERDF specific funding regimes to ensure audit success of the WAC New Build Project.
- To be responsible for liaising with Project Management Team and contractors (if applicable) to ensure that relevant claim information is co-ordinated, received by all bodies, and completed to the required standard in order to submit the ERDF claim on a quarterly basis within grant funding timescales.

### **Performance reporting and management**

- To ensure attendance as required at all levels of external Audits recovering and presenting evidence as requested to ensure a successful audit outcome is achieved.
- To review grant claim project expenditure (to include purchase invoices, travel expenses, TimeR allocations) to ensure claimed costs are eligible and contain the correct supporting information to be included within the project grant claim.
- To ensure compliance with those aspects of a contract which directly relate to day-to-day delivery and/or performance by identifying corrective action and measuring progress to its conclusion.
- To effectively compile, process and upload data and accurately enter required information into various data management systems.
- To maintain all internal files and data in accordance with audit and regulatory requirements and company practices.

### **KEY RESULT AREAS:**

- To collate and submit timely and accurate quarterly claims and sample information for the WAC New Build Project.
- To liaise with contractors and Project Management Team to ensure accurate, timely submission of claims, monitoring and management information.
- To support the WAC New Build Project Contract Manager, WAC CEO and Finance Manager and Project Management Team on matters of compliance and administration, contributing to the successful and professional delivery of this project.
- To play a critical role in ensuring that the delivery of the WAC New Build Project is compliant and accurately administered through the delivery of a comprehensive and effective compliance and administrative function.

## **PERSONAL AND TEAM RESPONSIBILITIES:**

- Provide a good role model for staff and trainees and project a positive image to internal and external contacts and customers
- Demonstrate the Company's culture, values and behaviours:
  - achieving excellence
  - valuing ourselves and others
  - showing personal leadership
  - being passionate about what we do
  - committing to a low carbon future for all
- Take responsibility for own self-development on a continuous basis.
- Participate actively and positively in the effective management of activities across WAC.
- Display strong focus towards the delivery of all commissioned work, supporting the identification and securing of additional funding or contract opportunities
- Carry out responsibilities with due regard to the UK Data Protection Legislation and the General Data Protection Regulation (GDPR)
- Carry out responsibilities with due regard to the Company's Equal Opportunities Policy and Sustainable Development Policy
- Work at all times within the code of the Health & Safety Act.

**This job description is not comprehensive or exclusive and duties may be varied from time to time, but these will not change the general character or level of responsibility of the job. This job description and your performance will be regularly reviewed with you.**

**Good communication and organisation skills as well as self-motivation and self-confidence will remain essential qualities to fulfil this role.**

**Date Last Reviewed: June 2022**

**Approved by Manager:**

**Agreed with Post Holder:**

**Date Personnel Informed:**

## PERSON SPECIFICATION

**SERVICE:** Skills Development

**SECTION:** WAC New Build Project

**JOB TITLE:** Claims and Compliance Co-ordinator

### EXPERIENCE

Essential	Desirable	How identified
<ul style="list-style-type: none"> <li>• Demonstrable current experience of dealing with grant funding bodies to include dealing with grant claim preparation and audit.</li> <li>• Proven experience of submission of interim and final claims to current grant funding body regulations.</li> <li>• Experience of dealing with external audit bodies</li> <li>• Experience of managing information and data</li> <li>• Experience of designing, implementing and developing organisational systems</li> <li>• Experience of developing and improving systems and procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of the 2014-2020 European Programme regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Application form/CV</li> <li>• Interview</li> <li>• References</li> </ul>

### EDUCATION AND TRAINING

Essential	Desirable	How identified
<ul style="list-style-type: none"> <li>• Finance qualification or relevant experience at an appropriate level</li> </ul>		<ul style="list-style-type: none"> <li>• Application form/CV</li> <li>• Certification</li> </ul>

### BEHAVIOURS

Essential	Desirable	How identified
<ul style="list-style-type: none"> <li>• Ability to communicate effectively at all levels</li> <li>• Excellent inter-personal and team-working skills</li> <li>• Highly motivated with positive approach</li> <li>• Efficient time management without the need for close supervision and taking a proactive approach.</li> <li>• Appropriate regard for confidential information including the processing of sensitive data.</li> <li>• Self-motivation, commitment and enthusiasm</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to deliver effective training sessions to Project Management Team, contractor and/or WAC staff (if applicable)</li> </ul>	<ul style="list-style-type: none"> <li>• Application form/CV</li> <li>• Interview</li> <li>• References</li> </ul>

## KNOWLEDGE AND SKILLS

Essential	Desirable	How identified
<ul style="list-style-type: none"> <li>• Experience and knowledge of ERDF funding regulations</li> <li>• Use and Knowledge of external funders electronic submission for claims, E-claims</li> <li>• Ability to comprehend and interpret funders' regulations</li> <li>• Ability to identify and implement changes to the benefit of the organisation</li> <li>• Computer literate in Microsoft Office products with a good working knowledge of Excel</li> <li>• Strong communication skills.</li> <li>• Team player</li> <li>• Excellent interpersonal skills</li> <li>• Excellent organisational and administrative skills, with ability to prioritise and manage work to meet deadlines</li> <li>• Problem solving and analytical skills and the ability to define and implement solutions</li> <li>• Ability to work in a changing environment</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of ERP/Oracle financial system</li> <li>• Experience of database operation</li> <li>• Ability to read and interpret financial reports</li> </ul>	<ul style="list-style-type: none"> <li>• Application form/CV</li> <li>• Interview</li> <li>• References</li> </ul>

## ANY ADDITIONAL FACTORS

Essential	Desirable	How identified	How identified
<ul style="list-style-type: none"> <li>• Ability to work alone on own initiative, but also as member of a team</li> <li>• Confident in dealing with a range of people and situations at all levels within the Company</li> <li>• Appropriate regard to confidential Company or Service information.</li> <li>• Ability to undertake travel within the county on an occasional basis</li> <li>• Ability and willingness to work occasionally outside normal office hours</li> </ul>	<ul style="list-style-type: none"> <li>• Access to own vehicle</li> </ul>	<ul style="list-style-type: none"> <li>• Application form/CV</li> <li>• Interview</li> </ul>	

