

Job Description

Job Title: Financial Assessment Team Leader

Job number

Grade SO1

Overall purpose of the job

To ensure the compliant effective and efficient workload management of the Financial Assessment Team. Ensure that financial assessments and welfare benefit applications are carried out in a timely manner. Ensure that the management of financial assessments and welfare benefit claims are conducted accurately and effectively.

To manage the flow of work for the service in a professional, customer focused and efficient manner utilising a combination of people, process and technology

Improve service performance and financial efficiencies in line with overall directorate and corporate objectives through allocation of work and effective staff management

Main accountabilities

Main accountabilities	
1.	Provide operational services within the Financial Assessment Team. Work closely with the Financial Assessments Operations Manager, keeping them informed of staff, process, system or performance issues and take responsibility for resolving issues or recommending options for resolving them as appropriate.
2.	Take responsibility for ensuring that efficient, accurate and timely end-to-end processes are in place and are being utilised effectively.
3.	Ensure service priorities are met, resources are used efficiently and customer and audit requirements are adhered to through effective management.
4.	Provide day to day line management for staff, taking responsibility for developing, appraising and rewarding team members and tackling performance / absence issues in the first instance.
5.	Provide advice to the Financial Assessments Operations Manager on areas of the service where improvements could be made and make recommendations to improve efficiency.
6.	Respond to and resolve complex requests and queries
7.	Embed a quality framework and monitor outputs, addressing identified areas as appropriate
8.	Embed customer service excellence within operational team through the design of customer focussed processes, the Our Conversations process and own behaviours.
9.	Work collaboratively on projects that support developments / improvements for the Financial Assessments Team in a professional and positive way. To liaise with the Financial Assessments Operations Manager to secure the necessary support to implement developments and improvements within the service.
10.	Demonstrate awareness / understanding of equal opportunities and other people's behaviour, physical, social and welfare needs.
11.	Ensure that reasonable care is taken at all times for the health, safety and welfare of yourself and other persons, and to comply with the policies and procedures relating to health and safety within the business.
12.	Take ownership and responsibility for complex cases where additional support is required by the staff
13.	Carry out any other duties which fall within the broad spirit, scope and purpose of this job description and which are commensurate with the grade of the post

Safeguarding commitment *(Include for roles involving work with children/vulnerable adults)*

We are committed to safeguarding and promoting the welfare of children and young people/vulnerable adults. We require you to understand and demonstrate this commitment.

Person Specification

Qualifications, knowledge, skills and experience

Minimum level of qualifications required for this job

Qualifications Required	Subject	Essential/ Desirable
A Level / NVQ Level 4 or equivalent	Business & Administration or Finance or significant experience gained in a similar or related service	Essential
Full Driving Licence		Essential

Minimum levels of knowledge, skills and experience required for this job

Identify	Describe	Essential/ Desirable
Knowledge		
Care Act 2014 relating to the Financial Assessment service	Detailed knowledge relating to the Financial Assessment service	Essential
Welfare Benefits legislation	Broad knowledge including state, welfare, housing and income tax benefits and the impact of welfare benefits for both customers and the local authority in promoting independence and maximising income for both parties.	Essential
Knowledge of Social Care Case Management Systems Mosaic	Some operational experience	Desirable
Knowledge of Oracle and/or Agresso ERP Systems	Some operations experience	Desirable
Knowledge / experience of legal issues in handling and managing complaints and complex queries	Some operations experience	Desirable
Skills		
Excellent IT skills with good knowledge of Microsoft office applications to produce system documentation and presentations	Some operational experience	Essential
Ability to influence and communicate with managers, suppliers and customers to ensure that changes and operational processes and priorities are understood	Significant operational experience	Essential
Ability to work with internal and external stakeholders to support the delivery of the Financial Assessment Service in line with the annual service plan	Some operational experience	Essential
Ability to understand and interpret national legislation, policies and guidance to ensure processes are compliant with national requirements	Operational experience	Essential

Ability to analyse and evaluate data and financial information related to the Financial Assessment Service to support the production of management reports and information on service performance to meet service area requirements	Some Operational experience	Essential
Ability to travel to visit service users where appropriate	Significant operational experience	Essential
Experience	Give an idea of the type and level of experience required do not specify years of experience.	
Experience of supervising, coaching and mentoring less experienced colleagues and team members to support the achievement of individual and team performance and development objectives	Some operational experience	Essential
Experience of developing user guides and training documentation for financial assessment processes.	Significant operational experience	Essential
Experience of working independently scheduling and prioritising own work and that of others to meet service requirements.	Significant operational Experience	Essential
Proven customer service background with experience of conflict resolution, negotiation and diplomacy skills.	Some operational experience	Essential
Experience and proven ability to identify service improvements to current processes and manage change.	Some operational experience	Essential
Experience of working with vulnerable service users, their carers and / or advocates	Substantial operational experience	Essential
Safeguarding (include for roles working with children/vulnerable adults)	Demonstrate an understanding of the safe working practices that apply to this role.	
	Ability to work in a way that promotes the safety and well-being of children and young people/vulnerable adults.	Essential

Disclosure level

What disclosure level is required for this post?	None	Standard
	Enhanced	Enhanced with barred list checks

Work type

What work type does this role fit into? (tick one box that reflects the main work type, the default workers type is flexible)	Fixed	Flexible	Field	Home
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