

Job Description

Job Title: Senior Client Funds Officer

POSCODE:

Grade: S01

Overall purpose of the job

The post holder will be responsible for ensuring that the financial affairs of the Council's most vulnerable clients are discharged in line with requirements of the Mental Capacity Act 2005. The client's affairs will be managed under either a DWP Corporate Appointeeship or a Court Appointed Deputyship Order.

This role extends from the moment that their incapacity has been adjudged to the settlement of the client's estate - providing an ongoing personal relationship with the client and their families for the entire period, and dealing with extremely challenging and complex legal, financial, family, and emotional matters within their best interests.

The post holder is responsible for making all financial decisions that directly affect the client's finances and wellbeing.

Main accountabilities

Please list the accountabilities in descending order of priority. Please include 6-9 accountabilities.

Main accountabilities	
1.	<p>Partnership Working</p> <p>Manage a caseload of Appointee and Deputyship cases and be responsible to undertake the Council's statutory duties in relation to the best interest and safeguarding of vulnerable adults against financial abuse and their finances, liaising, instructing, and directing agencies accordingly:</p> <ul style="list-style-type: none"> • Court of Protection and Office of Public Guardian • Benefits Agency/Department of Work & Pensions • Cambridgeshire County Council Finance Staff, debt/income • Adult Social Care (ASC) services and staff, Care providers, charities, and Motability • External credit and utility providers • Families of clients • Police and other agencies connected to safeguarding issues • Legal, financial establishments and financial advisors • NHS • Debt Agencies
2.	<p>Client Support</p> <p>Ensure that the client's property remains habitable, dealing with any health and safety and environment issues urgently. Investigate, liaise and engage services, lead the direction with relevant agencies/companies/trades as appropriate.</p> <p>Responsible for conducting CCC's protection of property policy responsibilities for our clients. Manage and co-ordinate a full search and protection of the client's property, securing all the financial and non-financial assets and making necessary arrangements for secure storage or investment management. Regularly monitor the income/expenditure, advise a social worker/duty team immediately if the clients finances will be unsustainable with the current living arrangements.</p>

	<p>Be accountable for ensuring the safeguarding of all client’s financial assets, ensuring the Council follows the relevant procedures for ensuring safeguarding, welfare, and financial regularity.</p> <p>Ensure the effective investment of the client’s financial assets to protect capital values and secure professional investment advice where necessary.</p> <p>Ensure that the clients care provision is value for money and investigate, liaise and challenge where this does not appear to be the case.</p>
<p>3.</p>	<p>Client Administration</p> <p>Check Court of Protections forms completed by Adult Social Care and when correct, make legal applications to the Court of Protection, to include attendance at meetings and hearings to enable becoming an appointee for receiving benefits and the clients “Deputy for Property and Affairs”. Represent and support clients at Tribunals and other legal/benefit related/tenancy related issues to meet the clients and organisation’s needs.</p> <p>Decide on the benefits appropriate to the client’s circumstances and then make the relevant benefit applications the client is entitled to, challenging benefit awards where necessary, update DWP and Tax office regarding any change in financial assets, to stop underpayments/overpayments of benefits.</p> <p>Supervised and accountable to the OPG for the financial decisions made during the reporting year. Ensuring clients financial affairs are managed within the Deputy Standards as expected by the OPG.</p> <p>Manage all income, liabilities and obligations on behalf of each client within their best interests and know when to access grants and obtain legal advice.</p> <p>Provide advisory service to social workers and Next of Kin on how to complete appropriate forms, benefits, COP applications, advise on Panel Deputy applications or any other relevant guidance.</p>
<p>4.</p>	<p>Client Review</p> <p>Undertake annual reviews with Deputyship clients to ensure their needs and wishes are being upheld in the line with the Mental Capacity Act 2005 and relevant equality and diversity legislation.</p> <p>Undertake ad-hoc reviews with Care Providers where significant financial spends have been requested, taking the lead for Best Interests meetings with accountability to make the final decision. Meet and liaise with family members to resolve overly complex financial matters. Using empathy, discretion, and communication skills to uphold the client’s best interests.</p> <p>Be accountable for the financial status of clients including changes to their circumstances that may have a financial impact. Ensuring payments made are affordable and appropriate.</p>
<p>5.</p>	<p>Representation</p> <p>Provide accurate financial information and records and manage situations that arise in relation to complex family dynamics, safeguarding and investigations around allegations of financial abuse.</p> <p>Represent the Council by attending APAD (Association of Public Authority Deputies), Trojan (Caspar cloud) regional and OPG (Office of the Public Guardian) network meetings, identify and share best practice</p> <p>Manage the disposal of estates in accordance with wills, probate and the client’s known wishes. Locate and engage with Next of Kin, taking responsibility for selling client property/possessions.</p> <p>Making decisions on property renovations and remedial work for community-based clients to include engaging and managing contractors/trades</p>

6.	<p>Other Duties</p> <p>Senior Client Funds Officer will be expected to perform other duties which fall within the broad spirit, scope, and purpose of this job</p> <ul style="list-style-type: none"> • Be responsible to be able to work under pressure with tight deadlines, managing and prioritising own case load. • Debt negotiating with creditors to ensure the debt is valid and paid in a timely manner. • Support the Client Funds Manager in the delivery of the service, to provide expert support for others in the team and to cover the Client Funds Manager in their absence. • Be required to work collaboratively and cooperatively with other Council Services. • Represent the Manager as required, including attendance at internal/ external meetings. • Participate in project activity
7.	<p>Process Administration</p> <p>Support system implementations including conducting system testing, developing system documentation / process notes, and delivering training to staff on new system processes. Provide advice and guidance to other departments and external bodies when dealing with service users affairs.</p>
8.	<p>Development and Awareness</p> <p>Demonstrate awareness / understanding of equal opportunities and other people's behaviour, physical, social and welfare needs. Apply these principals with service users when giving consideration for best interest and decision making. Demonstrate an awareness and understanding of equality, diversity and inclusion.</p> <p>Ensure that reasonable care is taken 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 including Lone working policy.</p>

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
Educational	Educated to A level, NVQ Level 3 or experience gained in a similar or related working environment.	Essential
Full Driving Licence		Essential

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

Identify	Describe	Essential/ Desirable
Knowledge		
Knowledge of Welfare Benefits processes and entitlements / Mental Capacity Act 2005 / the MCA code of practice / Court of Protection and Office of the Public Guardian procedures and regulations, financial regulations and personal taxation	Substantial operational experience	Essential
Knowledge of systems used to manage service user casework in a social care environment, e.g., CASPAR, MOSAIC ERP Systems	Some operational experience	Desirable
Knowledge of legal issues in handling complaints and queries	Some operational experience	Desirable
Skills		
Ability to collate, check, complete, produce, and present information relating to a service users' activities, finances and capabilities using statistical data to enhance understanding and decision making Plus key terms/ terminology/requirements for benefit entitlements, claims and returns	Significant operational experience	Essential
Ability to manage and prioritise your own workload. Maximising Income for the service user and minimising loss / debts. Dealing with issues, disputes, and emergencies; making sound decisions as and when required.	Significant operational experience	Desirable

Planning the monitoring of service user budgets and future events.		
Ability to understand and interpret national legislation, policies and guidance to ensure processes are compliant with national requirements, working in the best interests of service users	Some operational experience	Desirable
Ability to gather, check and challenge financial and nonfinancial information related to Appointeeship and Deputyship service users to support applications for benefit, tribunals, and debt negotiations	Some operational experience	Essential
Ability to travel to visit service users and lead best interest meetings	Significant operational experience	Essential
Excellent IT skills with good knowledge of Microsoft office applications	Significant operational experience	Desirable
Ability to work with internal and external stakeholders, make joint decisions to support the delivery of the Client Funds service in line with the annual service plan	Significant operational experience	Essential
Ability to communicate with and influence people whilst demonstrating empathy, diplomacy and understanding of their care and disability needs and / or mental health needs	Significant operational experience	Essential
Ability to build and maintain good working relationships with a wider range of colleagues, internal and external service users and stakeholders to deliver the service	Some operational experience	Essential
Experience		
Experience of developing user guides and training documentation for Appointeeship and Deputyship processes	Some operational experience	Desirable
Experience of working independently scheduling and prioritising own work to meet service requirements and service user requirements	Significant operational experience	Essential
Experience of visiting service users and representatives off site to support them with managing their financial affairs and ensuring that their property and assets are maintained.	Significant operational experience	Desirable

Proven customer service background with experience of conflict resolution, negotiation and diplomacy skills	Significant operational experience	Essential
Experience and proven ability to identify service improvements to current processes and manage change in a controlled way	Some operational experience	Desirable
Supervisory experience	Some operational experience	Desirable
Experience of working with vulnerable service users, their carers and / or advocates	Significant operational experience	Essential
Equality, Diversity and Inclusion (applies to all roles.	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
Safeguarding (include for roles working with children/vulnerable adults)		
Demonstrate an understanding of the safe working practices that apply to this role		Essential
Ability to work in a way that promotes the safety and well-being of 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 work type is hybrid)	Fixed	Hybrid X	Field	Remote	Mobile
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