

**WHERE
CAREERS
THRIVE**

**When potential
is unlocked,
talent *thrives***



**West
Northamptonshire
Council**

Job description and person specification

Senior Client Funds Officer

Client Funds Team, Commissioning and Performance

Thank you for your interest in this role. Our vision at West Northamptonshire Council (WNC) is: 'to make West Northants a great place to live, work, visit and thrive'.

We truly stand by this and work hard every day to make this a reality, and at WNC it's about our people. People who thrive with ambition, bring new ideas, demand better ways of working, care about every detail, and who never shy away from a challenge.

Our culture is a gateway for new experiences. A place to forge new opportunities. To empower you in your career and unite you with like-minded people. When potential is unlocked, talent thrives.



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Purpose and impact:

The purpose of the role is to provide a financial and safeguarding service to vulnerable adult service users that are subject to an Appointeeship or Deputyship to ensure financial affairs are managed appropriately and to offer protection from financial abuse. Ensuring duties are carried out in line with the requirements of the Mental Capacity Act 2005, Financial Regulations, Taxation, DWP legislation, The Office of the Public Guardian Standards and Court of Protection guidelines.

Resolve legal, financial, family and emotional matters that can often be challenging and complex in order to effectively manage clients personal financial affairs who have been assessed as having no capacity themselves to do so.

To ensure an integrated approach to Finance Operations through assisting with the implementation of new technologies, methodologies and processes that meet the needs of clients, customers and client organisations.

Accountable to:

This role is accountable to the Team Leader and Client Money Manager of the Client Funds Team and the role sits within Finance Operations team of Commissioning and Performance in West Northamptonshire Council.

Responsibilities:

1. Responsible for day-to-day management of service users' affairs and in line with current legislation and the stated policies of the organisations involved, making sound judgements / decisions. Work closely with the Team Leader and Corporate Deputy, keeping them informed of service user, process, system or performance issues and take responsibility for resolving issues or recommending options for resolving them as appropriate.
2. Manage and prioritise own case load which includes dealing with correspondence, making payments, providing emergency funds, claiming benefits to maximise a service users income, negotiating agreements, debt settlements, reporting information to the OPG / COP / DWP / Tax Office, representing and supporting service users at Tribunals and other legal / benefit related / tenancy related issues in order to meet the service users and organisations needs. Dealing with property maintenance, ensuring that client property is safe and secure, and house clearances as appropriate which will include inventory checks. Assisting with the administration of estates and funeral arrangements.
3. Ensure operational service priorities are met and customer and audit requirements are adhered to through effective workflow management.
4. Respond to and resolve complex and sensitive service requests and queries within the agreed service standard and according to operational procedures.
5. Provide advice to the Team Leader on areas of the service where improvements could be made and make recommendations to improve processes and efficiency.
6. Provide training, advice and support to other staff, departments and external bodies when dealing with service users affairs and operational procedures.

7. Attend meetings/ visits to complete annual finance reviews, best interest decisions, mediate and resolve issues face to face with internal/ external bodies and families.
8. Embed customer service excellence within team through the design of customer focussed processes, active participation in one-to-one meetings / the PADP process and own behaviours
9. Manage own workload and conflicting and critical priorities / deadlines, processing information / data accurately and in a timely manner.
10. 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.
11. Work collaboratively on projects that support both system and operational developments. Test systems, review work practises and support training. Provide improvements for the Finance Operations Service in a professional and positive way, improving performance on ongoing basis
12. To maximise personal productivity, minimise duplication and errors; and manage our information efficiently and securely to reduce risk, though effective use of Office 365 and our internal IT systems and applications.
13. Actively challenge and seek to eliminate any directly or indirectly discriminatory practice or behaviours.
14. Demonstrate awareness and understanding of other people's behavioural, physical, social and welfare needs and ensure that reasonable care is taken at all times for the health, safety and welfare of yourself and other persons.

This job description reflects the major tasks to be carried out by the post holder and identifies a level of responsibility at which they will be required to work. In the interests of effective working, the major tasks may be reviewed from time to time to reflect changing needs and circumstances. Such reviews and any consequential changes will be carried out in consultation with the post holder.

Person specification:

The requirements for the role are outlined below and will be part of the selection process. Each of the criteria listed below will be measured by:

(**A**) Application Form, (**T**) Test, (**I**) Interview, (**P**) Presentation, (**D**) Documentation.

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

Skills and abilities:	Essential / Desirable	Measured by
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	Essential	A, I
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. Planning the monitoring of service user budgets and future events.	Essential	A, I
Ability to understand and interpret national legislation, policies and guidance to ensure processes are compliant with national requirements, working in the best interest of service users	Essential	A, I
Ability to gather financial and non-financial information related to appointeeship and deputyship service users to support applications for benefit, Tribunals, debt negotiations and the production of management information reports	Essential	A, I
Ability to travel to visit service users where appropriate	Essential	A, I, D
Excellent IT skills with good knowledge of Microsoft office applications	Essential	A, I, D
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	Essential	A, I
Ability to communicate with and influence people whilst demonstrating empathy, diplomacy and understanding of their care and disability needs and / or mental health needs	Essential	A, I
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	Essential	A, I
Demonstrate effective use of Office 365 (incl. Teams, OneDrive, etc.) or willingness to undertake training during the probation period.	Essential	A/T/I

Knowledge:	Essential / Desirable	Measured by
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.	Essential	A, I
Knowledge of ERP Systems	Desirable	A, I
Knowledge of legal issues in handling complaints and queries	Desirable	A, I

Knowledge of systems used to manage service user casework in a social care environment, e.g. CASPAR, Eclipse, Sharepoint, Abacus, etc	Desirable	A, I
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Relevant experience:	Essential / Desirable	Measured by
Experience of developing user guides and training documentation for appointeeship and deputyship processes	Desirable	A, I
Experience of working independently scheduling and prioritising own work to meet service requirements and service user requirements	Essential	A, I
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.	Essential	A, I
Proven customer service background with experience of conflict resolution, negotiation and diplomacy skills	Essential	A, I, D
Experience and proven ability to identify service improvements to current processes and manage change in a controlled way	Essential	A, I
Supervisory experience	Desirable	A, I, D
Experience of working with vulnerable service users, their carers and / or advocates	Desirable	A, I, D
Ability to work in a way that promotes the safety and well-being of children and young people/vulnerable adults.	Essential	A, I

Education, training and work qualifications:	Essential / Desirable	Measured by
Educated to A level, NVQ Level 3 or experience gained in a similar or related working environment. Business & Administration or Finance related experience	Essential	A, I, D
Full Driving Licence	Essential	D

All appointments are subject to standard pre-employment screening. This will include identity, references, proof of right to work in the UK, medical clearance and verification of certificates.

Additional pre-employment checks specific to this role include:

Enhanced Disclosure and Barring Service check

Day-to-day in the role:

Hours:	37 Hours Per week	Primary work base:	Angel Square
Job family band:	RT6	Worker type:	Part Flexible
Salary range:	£31,869	Budget responsibility:	
People management responsibility:			

Working conditions & how we work:

This role has been identified as a part-flexible worker type, this means that you will be able to work from other work locations and when not working from an office you will be working remotely for up to 3 days a week (including from home).

Our organisational values and behaviours

Everything we want to achieve for West Northants depends on having the right people in place and doing the right things and we want all colleagues to THRIVE, both personally and professionally. Our values and our behaviours framework underpin how we work and what partners and customers can expect from us. We want to do our very best for our residents, service users and businesses and for our staff – we want everyone to THRIVE.

T	Trust	We are honest, fair, transparent and accountable. We can be trusted to do what we say we will.
H	High Performing	we get the basics right and what we do, we do well. We manage our business efficiently.
R	Respect	we respect each other and our customers in a diverse, professional and supportive environment.
I	Innovate	we encourage curiosity, we are creative and seize opportunities to grow individually as an organisation and as an area.
V	Value	We continually strive for best practice and ways of improving existing procedures, practices and systems and thereby promoting efficiency and cost effectiveness
E	Empower	we believe in people, will listen, learn and trust them to make decisions. We help people to realise their ambitions.

“Valuing colleagues as individuals and encompassing our different perspectives to deliver our collective ambitions. One West inclusive culture”

When potential is unlocked, talent *thrives*

Choose a career that offers you a true sense of achievement, fills you with pride and challenges you in a positive way, everyday.

The benefits of a career at WNC include:

- **People** are at the centre of everything we do. Without our people, we wouldn't be able to deliver services to the people in our community.
- **Ambition** runs through everything we do at West Northants Council, we nurture and develop our people's ambition and willingness to succeed, to continually improve the service we provide to the community.
- **Care** is at the heart of West Northants Council, we care in so many ways; seen and unseen, helping our colleagues and community to thrive.
- **Flexibility** is key, we know work-life balance is critical to wellbeing, so we work hard to make sure our benefits package promotes and improves wellbeing; from annual leave, sick pay, family leave and flexible working, financial security offered by a local government pension scheme and life assurance, and discount schemes which make a difference to your day-to-day life, through to employee helplines offering free legal, health, financial and wellbeing advice and support.

We want you to have balance and be happy.

