

Job Description

JOB TITLE:	Finance Officer Client Affairs
GRADE:	H
POST NUMBER:	D000200013, H070020030, H070020035
DIRECTORATE:	Resources
SERVICE:	Finance Audit & Procurement
RESPONSIBLE TO :	Team Manager Client Financial Affairs
RESPONSIBLE FOR:	n/a
	DBS Basic / Enhanced check not required This post is not politically restricted
JOB SUMMARY:	<p>To provide an efficient, effective and comprehensive Client Financial Affairs service on behalf of the authority in accordance with statutory requirements and the council's policy and procedure. Coordinate, manage, budget and plan for all allocated deputyship and Appointeeship cases, make funeral arrangements and close cases.</p> <p>Provide guidance and support to other council departments and external stakeholders around DWP Appointeeship and court of protection matters. To receive, liaise and correspond with clients, next of kin, social work team, internal and external stakeholders to resolve queries. To interact with external bodies such as the Department for Works and Pensions, Court of Protection, Office of the Public Guardian, care agencies and genealogy companies and other such organisations.</p>
ROLE REQUIREMENTS:	
1.	Ensure that all the services within the area of responsibility are provided in accordance with the London Borough of Tower Hamlet's commitment to high quality service provision for our clients
2.	Provide support and financial advice to clients and undertake duties in accordance with statutory requirements, financial regulations, and team policy and procedures
3.	Manage, review and plan clients' budgets in partnership with the social care colleagues, including the reconciliation of client accounts using ContrOCC, resolving financial issues, revising and resetting payment schedules and liaising with financial institutions
4.	Ensure both recurring and ad hoc payments are set up and processed accurately within the required timeframes. Setting up Direct Debits and Standing Orders as required.
5.	Making timely applications to the DWP for LBTH to be appointed as Corporate Appointee. To ensure all benefits are received, appeals and applications are made and that the funds received are used in the best interests of the client.

6.	Making timely applications to the Court of Protection for the appointment of LBTH as property & affairs Deputy, following the application process, adhering to all timeframes and following the instructions within the order
7.	Engage in effective liaison with internal and external audit as and when required. To include the accurate and efficient recording, filing and retention of information and maintenance of appropriate audit trails for subsequent retrieval
8.	Utilise and keep updated the systems available to the team to include Bankline, Controcc, Allpay prepaid cards and the Agresso financial ledger system as appropriate, to retrieve clients' information, including initiating payments, invoices and credit notes where required. Updating the clients account records to include the necessary financial data and reconciliations to be able to monitor the clients' accounts
9.	Advise on enquiries received from professionals and relatives of clients including the Court of Protection, Office of the Public Guardian, Department for Work and Pensions and other government agencies through writing letters or e-mail and ensure all correspondence is recorded, and client's accounts are updated.
10.	To arrange for contractors to undertake minor works required by the client.
11.	Making suggestions to improve team policy and processes and ways of working. To keep updated with best practice in the field to develop the Council's own policies and procedures, and personal knowledge around Deputyship and Appointee work.
12.	To protect and promote the financial interests of clients, ensuring all statutory obligations are fulfilled and maximising the receipt of income on the client's behalf
13.	Ensure the financial protection and promotion of all client's assets as per the key requirements of the post
14.	To attend client-related meetings with internal and third-party organisations as necessary.
15.	Undertaking on-site and virtual client visits with social workers for financial review, maintenance, and management of client's assets in accordance with the Council's health and safety policy and the Office of the Public Guardian's regulatory framework
16.	Ensure the effective co-ordination and timely submission of all financial returns and sundry forms
17.	Provide a comprehensive range of administrative support including arranging appointments, booking meeting rooms, taking minutes at meetings, developing and maintaining spreadsheets, archiving and retrieving information including opening of post, scanning in and organising document and filing away paper documents and anything else in support of this role
18.	To support the work of colleagues, the Team Manager and the Head of Strategic Finance (Health, Adults & Community)
19.	To ensure that duties are undertaken in compliance with the data protection and other relevant legislation
CORPORATE RESPONSIBILITIES	
20.	Actively contribute to the council's priorities and outcomes in a way that promotes a 'one organisation' approach.
21.	Develop and maintain positive relationships with colleagues, stakeholders and communities to ensure the council and the directorate strategic priorities are effectively implemented.
22.	Promote equality among all staff and ensure that services are delivered in a non-discriminatory way, that is inclusive of all disadvantaged groups.
23.	Support organisational change and learning, following and implementing appropriate systems of self-development, communication and engagement, quality measures, monitoring and review in delivering the functions of the role.

24.	Promote sustainability, including encouraging a culture of innovation and accountability amongst all council staff.
25.	Ensure that all duties and responsibilities are discharged in accordance with the council's policies and procedures, Code of Conduct and relevant regulations and legislation.
26.	To comply with the council's equal opportunities and diversity policies ensuring anti-discriminatory practice within the service area.
27.	To undertake additional duties that may arise from time to time commensurate with the grade of the post.
PEOPLE	<i>[This should detail those aspects of that require contact and interaction with other individuals, either within the council and/or in outside organisations, and the intended outcome of this]</i>
28.	Work flexibly and collaboratively with other Finance Officers and finance colleagues across the Service to help provide an effective and efficient Finance Service
FINANCE	<i>[This is for roles that have budgetary responsibility, e.g. the requirement of managing budgets, delivery targets and the efficient deployment of resources – delete if not applicable]</i>
29.	Support the Director of Finance to effectively manage relevant budgets, deliver financial targets and efficiently deploy resources as appropriate for the Finance Division
SERVICE	<i>[This section will include requirements that the job holder may have in respect of quality assurance, continuous improvement, and the efficiency of the service]</i>
30.	Contribute to the Service vision of continuous improvement, seeking out process and other improvements wherever possible and cascading these across colleagues within the department To ensure that the efficiency of the service to clients, family members, external bodies, and internal partners is always maintained
PERFORMANCE	
	<i>[This section needs to list the specific targets that are required to be met by the post holder and how these will be achieved]</i>
31.	Work to reach the performance standards agreed with line manager and to achieve the targets set out within the Council's annual performance appraisal process
32.	Assist in the collection of regular information on set targets and key performance indicators relating to the full range of services provided by the Client Financial Affairs team
OTHER CONDITIONS:	
33.	To maintain personal and professional development to meet the changing demands of the job and participate in appropriate training/development activities including the council's 'My Annual Review' scheme

Person Specification

Person Specification for the Post of		Essential (E) or Desirable (D) (if applicable)	Method of Assessment A= Application Form T= Test I= Interview
Knowledge	<ul style="list-style-type: none"> • Knowledge of financial accounting in a large organisation. • Knowledge of best practice and the regulatory framework in accountancy • Knowledge of the requirements of auditors in a public sector organisation. • Knowledge of how to use financial systems and computers to extract, analyse and present data. 	<p>E</p> <p>D</p> <p>D</p> <p>E</p>	<p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p>
Qualifications & Experience	<ul style="list-style-type: none"> • Experience of managing service users finances. • Experience of making applications to the Court of Protection, preparing Witness statements and attending hearings. • Experience of preparing complex information in an accessible manner. • Experience of prioritising conflicting demands, to take the initiative to work effectively under pressure to achieve positive results. • Experience of making applications to and dealing with the DWP. • Experience of dealing with the Office of the Public Guardian, submitting Annual Accounts and dealing with queries. • Ability to communicate clearly, convincingly, and sensitively with a range of partners and clients, both orally and in writing. • Ability to develop and maintain effective individual, 	<p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p>	<p>A/I</p> <p>A/I</p> <p>A/I/T</p> <p>A/I</p> <p>A/I/T</p> <p>A/I/T</p> <p>A/I</p> <p>A/I</p>

	<ul style="list-style-type: none"> team and stakeholder working relations. Ability to apply the principles of excellent customer focus. 	E	A/I
	<ul style="list-style-type: none"> Ability to ensure the effective coordination and timely submission of all financial returns. Ability to present a professional image of the Council and its services. Ability to develop positive and effective working relationships within a team. Ability to deal effectively with complex queries and to provide appropriate advice as required. Strong analytical and problem-solving skills, and a solution-focused approach. Organisational skills, able to deliver work and projects on time, efficiently and effectively. Committed to the delivery of customer-focused services and continuous service improvement. Ability to develop, manage and use systems to improve the monitoring and control of income and expenditure. Flexible and adaptable to rapidly changing service requirements and fluctuating workloads and responding quickly to changing demands. Performance orientated – sets and achieves high standards for self and others. 	E E E E E E E E E E	A/I A/I A/I A/I A/I A/I A/I A/I A/I A/I
	<ul style="list-style-type: none"> Commitment to the principles and practice of equality and diversity in employment and service delivery Ability to reflect diversity issues in the monitoring and evaluation of work 	E E	A/I A
	<ul style="list-style-type: none"> Actively pursuing Continuing Professional Development Able to share good practice and experience and learn from others both internally and externally. 	E E	A/I A/I

Living the TOWER Values sets out the essential		They are aligned to the organisation's	
behaviours required of all staff.		five TOWER Values	
We work TOGETHER across boundaries and with partners to achieve the best outcomes for Tower Hamlets	<ul style="list-style-type: none"> Seeks opportunities to build positive relationships with people from other teams and partners Builds networks with key teams they work with, to ensure they achieve the best outcomes. 	E	A/I
		E	A/I
We are OPEN and transparent	<ul style="list-style-type: none"> Checks understanding, they are understood by others and explains jargon where needed. Approachable and actively seeks feedback from others to improve how they do things. 	E	A/I
		E	A/I
We are WILLING to challenge, innovate and be accountable	<ul style="list-style-type: none"> Takes accountability for delivering own work, setting challenging goals for self. Looks for ways to continuously improve and develop within role. 	E	A/I
		E	A/I
We empower each other to be EXCELLENT and go the extra mile	<ul style="list-style-type: none"> Understands the organisations direction of travel and actively supports that in their work and interactions. Takes the initiative to improve outcomes because they can explain the difference they have made. 	E	A/I
		E	A/I

<p>We RESPECT all communities, they are the heart of everything we do</p>	<ul style="list-style-type: none"> • Takes ownership of more complex issues, whilst keeping the customer informed. • Open-minded and appreciates alternative cultural perspectives, taking it into account when delivering service. 	<p>E</p> <p>E</p>	<p>A/I</p> <p>A/I</p>
<p>Additional Requirements</p>	<p>Expected to attend meetings and travel where necessary to meet the requirements of the role, at times other than normal office hours.</p>	<p>D</p>	