

JOB DESCRIPTION & PERSON SPECIFICATION

Director Area: Resources

Job Ref Number: 03958

Service Area: Financial Strategy

Grade: G9

Job Title: Team Manager (COPA)

PURPOSE OF JOB:

As a Team Manager (COPA), you will report to the Client Finances Manager, and will be responsible for delivering a comprehensive Court of Protection and Appointee Financial Service:

Daily Management of the Team

Develop staff within your team through coaching, mentoring and leadership to achieve performance excellence.

Financial Management

Deliver timely working financial services for clients ensuring efficient and effective end-to-end processes.

Strong Financial Governance

Deliver a sound and compliant financial control environment ensuring compliance with the Department of Work and Pensions for Appointee clients and the Office of the Public Guardian for Court of Protection clients.

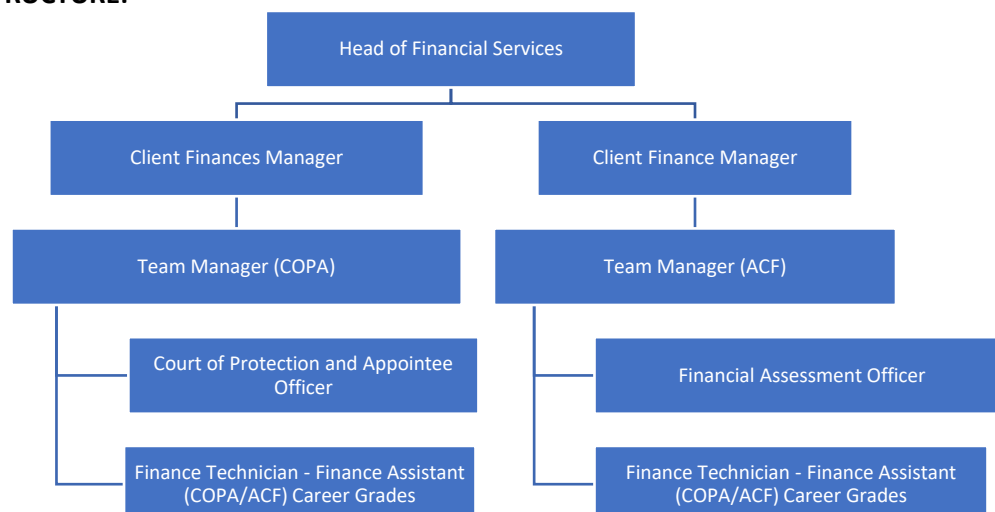
Provide Technical Expertise

Anticipate financial risks and/or opportunity providing technical expertise to mitigate / minimise / risk and maximise opportunities.

Customer Focused

Understand the needs and expectations of our customers and ensure prompt delivery of services, taking action to resolve queries and/or issues promptly and courteously.

TEAM STRUCTURE:



MAIN DUTIES:	
1	To deliver an efficient, effective, and compliant service on behalf of the Court Appointed Deputy. This includes the day-to-day management of the financial affairs on behalf of people who lack the capacity to do so for themselves.
2	To effectively plan, resource, organise and manage the work of the team, successfully processing Court of Protection and Appointee ship cases.
3	Responsible for ensuring the Court of Protection Service is delivered adhering to the Office Public Guardian Deputy Standards (published January 2023). This includes the completion of regular self-assessments against the standards and closing any gaps, risks of gaps.
4	As part of the Court of Protection service, manage the complexities of a vulnerable individual's bank accounts and property.
5	To develop systems, processes and technical guidance which ensures clients finances are easily accessible when needed and invested in accordance with the Investment Policy.
6	Proactively monitor complex accounts that require management oversight and/or review.
7	Liaising with social services and care givers of a vulnerable individual.
8	Complete returns on behalf of vulnerable individuals eg tax returns.
9	Complete the Office of the Public Guardian annual report and submit to the Client Funds Manager for approval.
10	Making applications to the Department for Work & Pensions to become Appointee, as well as applications to the Court of Protection to be appointed Deputy.
11	Undertake the Council's statutory duties in relation to safeguarding vulnerable adults and their finances.
12	Create the environment which establishes compliant record keeping including all payments made, decisions made, and orders received from the Court.
13	Develop and maintain an excellent understanding of cash on various client and deputyship accounts.
14	Develop and maintain comprehensive records of client income and expenditure for all deputyship clients.
15	Complete Court applications and associated documentation for submission to the Court of Protection.
16	Effectively manage complex caseloads drawing on your experience to manage sensitive situations, maintaining composure in uncertain or challenging situations.
17	Deliver the reporting structure to inform financial statements, operational performance and to ensure the Council's statutory obligations are met within the national timescales set.
18	Deliver advice and guidance to budget and spend managers ensuring prompt processing of individuals finances. Remove any barriers which risk delay to the process.
19	Deliver excellent customer service, incorporating the Council's equality and diversity objectives and supporting the council to achieve best practice in all it delivers.
20	Maintain professional awareness, keep up to date with changes to legislation and accounting standards, remain up to date and compliant with all relevant legislation, organisational procedures, policies and professional codes of conduct in order to uphold standards of best practice.
21	Look to continuously improve services in area of responsibility, identifying where possible, value for money savings and managing within allocated budgets.
22	Proactively manage the implementation of agreed service changes ensuring smooth transition and the new processes are embedded. maximising the benefits and efficiencies for both internal and external customers, including the promotion and use of self -service to achieve maximum cost effectiveness.

23	As an employee, create a positive image of the County Council. Act as a role model to others helping them to manage uncertainty and to respond positively and creatively to changing expectations.
24	To deliver within LCCs Information Governance principles ensuring the safe and confidential capturing, handling, transfer and storage of client data.
25	Responsible for the completion of all mandatory training applicable to the role in accordance with LCC employment policies including refresh within the stated timescales.
26	Responsible for undertaking Continuing Professional Development, applying the learning to enhance service delivery. Create a continuous improvement approach to the role and feeding in the wider LCC business performance improvement programme.
27	Comply with Health and Safety policies and procedures for staff ensuring risk assessments are carried out to minimise and/or mitigate risk to staff.

PERSON SPECIFICATION

Requirements	Where identified*	Essential	Desirable
Full or Part Qualified CCAB or CIMA accounting qualification. Where the appointed person does not have this, they should have at least 3 years' experience in a finance environment and they will be expected to study for this and/or the CIPFA Finance Business Partner Diploma, with the Council's support.	A	X	
Adheres to the Professional Code of Ethics, complies with the values and behaviours of the council and displays a positive attitude when delivering their role.	A	X	
Excellent team management skills with experience of creating a learning environment	A/I	X	
Empathy, attention to detail and accuracy are key skills for this role.	A/I	X	
Knowledge of the benefits system and Court of Protection process	A/I	X	
Excellent people skills maintaining composure in uncertain or challenging situations.	A/I	X	
Excellent Communication skills – ability to communicate effectively with staff across the Council and build excellent rapport with clients and their families, so as to secure their confidence and respect.	A/I/P	X	
Excellent in balancing multiple responsibilities, prioritising based on urgency and service/customer relevance adapting quickly to the changing environment. Excellent in meeting deadlines often dictated by an ever-changing external environment.	I	X	
Excellent presentational and report writing skills with the ability to engage and explain complex information to a range of audiences in a clear and concise manner and within established timeframes.	A/I/P	X	
Excellent analytical skills with the ability to methodically breakdown complex financial problems and articulate potential solutions clearly and without jargon.	A/I	X	
Excellent financial performance reporting skills aligned to the councils' objectives and the operating environment	A/I	X	
Excellent ICT skills covering Microsoft 365, Unit 4 BW and financial modelling tools.	A/I	X	