

## JOB DESCRIPTION & PERSON SPECIFICATION

**Director Area: Resources**

**Job Ref Number: 03957**

**Service Area: Financial Services**

**Grade: G11**

**Job Title: Client Finances Manager**

### **PURPOSE OF JOB:**

As a Client Finances Manager, you will report to the Head of Financial Services, and will be responsible for:

#### **Efficient, Effective, and Compliant Client Finance Services**

Establish and develop the team and services to deliver prompt Adult Care Financial Assessment, Court of Protection and Appointee Services to our clients in accordance with legislation.

#### **Strong Financial Governance**

Create and continuously evolve robust processes aligned to Standards, Policies and Procedures. Deliver a compliant financial control environment maximising financial opportunities and minimising risk of loss and fraud.

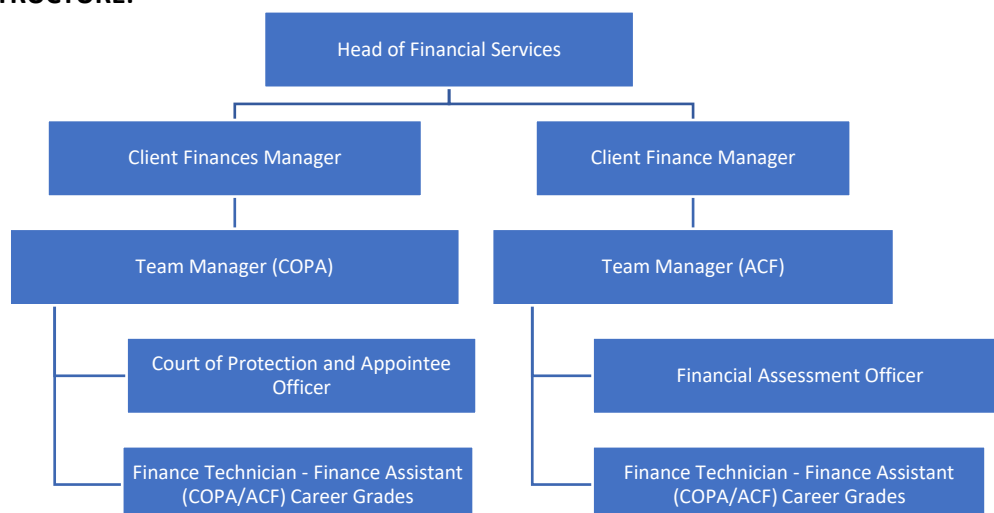
#### **Provide Technical Expertise**

Provide technical expertise and guidance ensuring the complexity of Adult Social Care Charging and Court of Protection and Appointee services are fully understood and continuously evolve.

#### **Strategic Workforce Planning**

Implement the Workforce Strategy ensuring development of a structure which encourages professional development and opportunities to improve skills to meet the need of the service. Provide coaching, mentoring and display leadership qualities which promotes performance excellence.

### **TEAM STRUCTURE:**



| <b>MAIN DUTIES:</b> |                                                                                                                                                                                                                                                                                                                                                        |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1                   | To effectively lead the Adult Care Financial Assessments and Court of Protection & Appointee Teams, ensuring the needs of the clients and the Council are met.                                                                                                                                                                                         |
| 2                   | The Care Act 2014 provides a single framework for local authorities to charge for care and support. Create the Adult Care Charging Policy and Framework for the Council which enables the Council to decide when to charge for care and support needs.                                                                                                 |
| 3                   | The Office of Public Guardian twelve standards confirm the expectations on the service where the court has appointed the local authority as a deputy. Create the Court of Protection Policies and Procedures for the Council which enables the Council to fulfil its duties and ensure the service successfully meets the standards assessed annually. |
| 4                   | Introduce systems and processes which support the efficient, effective, and compliant delivery of the Client Financial Services. This includes, but not limited to, case management system and the structure and processes associated with the Client Charging System.                                                                                 |
| 5                   | Create resources to provide advice and guidance to clients and staff enabling prompt delivery of services.                                                                                                                                                                                                                                             |
| 6                   | To ensure the successful delivery of key groups across the Client Finances processes including Financial Resolution Group and Waiver Panel.                                                                                                                                                                                                            |
| 7                   | To enable prompt delivery of Client Financial Services ensuring clients receive the services within the expected performance timeframes. Ensure performance delivery is fed into the Financial Services Performance Dashboard.                                                                                                                         |
| 8                   | Keep knowledge of Financial Regulations and Financial Procedures up to date, ensuring that they remain fit for purpose. Create mechanisms which ensure the regulations and procedures are communicated to clients and staff.                                                                                                                           |
| 9                   | Deliver excellent customer service, incorporating the Council's equality and diversity objectives and supporting the council to achieve best practice in all it delivers.                                                                                                                                                                              |
| 10                  | Build and enhance relationships both internal and external to Financial Services. This will involve dealing with complex and sometimes contentious matters requiring sensitivity as the outcome could have a material effect on the person, service or the Council.                                                                                    |
| 11                  | To recruit and retain staff in Client Finances Team. Contribute to the development of individuals across the team by coaching, mentoring and motivating staff to achieve performance and developing a culture of continuous improvement.                                                                                                               |
| 12                  | To provide complex technical expertise, guidance and support to staff involved in decision making both internal and external to the Council.                                                                                                                                                                                                           |
| 13                  | Breakdown highly complex problems and use experience and judgement to evaluate potential options for resolution.                                                                                                                                                                                                                                       |
| 14                  | 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.                                                                                                                                                                     |
| 15                  | To deliver within LCCs Information Governance principles ensuring the safe and confidential capturing, handling, transfer and storage of client data.                                                                                                                                                                                                  |
| 16                  | Ensure compliance with Equality and Diversity policies of LCC in relation to financial activities.                                                                                                                                                                                                                                                     |
| 17                  | Responsible for completing all mandatory training applicable to the role in accordance with LCC employment policies including refresh within the stated timescales.                                                                                                                                                                                    |
| 18                  | 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.                                                                                                      |

|    |                                                                                                                                                      |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------|
| 19 | 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 CCAB or CIMA accounting qualification. Where the appointed person does not have this, they should have at least 5 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         |           |
| Complies with the values and behaviours of the council and displays a positive attitude when delivering their role.                                                                                                                                                                          | A/I               | x         |           |
| Excellent people skills maintaining composure in uncertain or challenging situations.                                                                                                                                                                                                        | A/I               | x         |           |
| Extensive knowledge of the Care Act 2014 and the Council's Charging Policy                                                                                                                                                                                                                   | A/I/P             | x         |           |
| Excellent leadership skills with experience of creating a learning environment to encourage continuous improvement.                                                                                                                                                                          | A/I/P             | x         |           |
| Excellent Communication skills – ability to communicate effectively with internal and external stakeholders, building confidence and respect.                                                                                                                                                | I/P               | x         |           |
| Expert in balancing multiple responsibilities, prioritising based on urgency and service/customer relevance adapting quickly to the changing environment.                                                                                                                                    | I/P               | x         |           |
| Expert 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/T           | x         |           |
| Expert analytical skills with the ability to methodically breakdown complex financial problems and articulate potential solutions clearly and without jargon.                                                                                                                                | I/P/T             | x         |           |
| Expert ability to establish performance reporting aligned to the objectives and environment                                                                                                                                                                                                  | I                 | x         |           |
| Excellent ICT skills covering Microsoft 365, Unit 4 BW and financial modelling tools.                                                                                                                                                                                                        | A/P               | x         |           |
| Ability to work closely with other disciplines to deliver required policy objectives. Establish strong relationships both internally and externally, building customers confidence in your advice and guidance.                                                                              | A/I/P             | x         |           |

|                                                                                                                                                                                             |       |   |   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|---|---|
| Use good negotiation and influencing skills to inform decision making.                                                                                                                      | A/I/P | x |   |
| Able to formulate and offer balanced advice to Councillors and a large range of other council and external organisations, groups and bodies.                                                | A/I/P | x |   |
| A good appreciation of political sensitivity and ability to formulate and offer balanced advice.                                                                                            | I/P   | x |   |
| To understand and have awareness of the impact of decisions, recommendations and advice of equality and diversity.                                                                          | I/P   | x |   |
| A proven methodical approach to identifying opportunities for improvement across business processes including extensive process mapping skills.                                             | A/I/P |   | x |
| Detailed knowledge of the Council's constitution, Financial Strategy, financial regulations financial procedures, schemes of authorisation and their rationale within the control framework | I/P   |   | x |
| Detailed knowledge and understanding of local government finance including service funding arrangements                                                                                     | I/P   |   | x |
| Awareness of accounting standards including, CIPFA Code of Practice and International Financial Reporting Standards and the impact these have on the Council's Statement of Accounts.       | A     |   | x |

\*A = Application form      T = Test/Assessment      I = Interview      P = Presentation

## GENERAL

The postholder is required to take personal responsibility for contributing to organisational transformation and changes in ways of working, maximising the benefits and efficiencies for both internal and external customers, including the promotion and use of self-service to achieve maximum cost effectiveness.

The postholder is expected to work to the Lincolnshire County Council Core Values and Behaviours and to carry out the duties in accordance with Lincolnshire County Council policies.

**Other Duties** - The duties and responsibilities in this job description are not exhaustive. The post holder may be required to undertake other duties within the general scope of the post. Any such duties should not substantially change the general character of the post. Duties and responsibilities outside of the general scope of this grade of post will be with the consent of the post holder.

**Safeguarding** - All employees need to be aware of the possible abuse of children and vulnerable adults and if you are concerned you need to follow the Lincolnshire County Council Safeguarding Policy. In addition employees working with children and vulnerable adults have a responsibility to safeguard and promote the welfare of children and vulnerable adults during the course of their work.