

Job Family:	Delivery – Front Line – Process knowledge	Grade:	6
Job Title:	Property and Client Affairs Finance Officer	Directorate:	Resources Directorate
Date:	30th July 2018	Version:	1:1

Role Profile - Details Specific to Job Family

These roles would be regarded as “front line” service delivery roles. Here, role holders are directly accountable for performance, often through the direct control of significant resources or through managed contracts. These roles may also deliver some of their results through collaborative working with co-producers or other third party agencies.

At the lower levels, operational managers may oversee a department or team and at the lowest levels, direct contact with service users will be a common feature of roles in this job family. At the higher levels, they may be in charge of a department, large operational area or the management of significant contracts and may be ultimately accountable for ensuring compliance with statutory obligations.

Role Profile - Details Specific to Grade

Operating with limited guidance or instructions so that initiative and judgement are needed to determine to address and resolve short term (daily) problems. Likely to supervise a small team, assessing workload and prioritising tasks for others.

Roles requiring a level of process expertise to deliver an advisory or supervisory service.

Brief Description of job role and department

1. To perform with the highest level of professionalism and discretion in managing all financial issues relating to vulnerable clients and their families under Appointeeship and Deputyship within the Resources Directorate (Shared Finance Service for Sutton and Kingston)
2. To act in the best interest of the client and make decisions on their behalf, recognising challenges and identifying personal risk. To Liaise with all internal and external organisations regarding financial and property affairs implemented by the courts.
3. To ensure information relating to deceased clients are managed sensitively and the correct parties are informed in a timely manner. To manage the area for protection of property and arrangements of state funerals ensuring the procedures are followed and updated when legislations changes and are also carried out within the council’s procedures.
4. To liaise with internal and external parties when selling properties owned by clients under Deputyship, ensuring the properties are kept safe and secure during this process. Risk assessments are completed for each property and adequate Personal protective equipment stocked and worn.

Representative accountabilities

- Carry out independent but low risk interventions/assessments to identify customer needs or deliver services directly to customers.
- Assist more experienced colleagues in delivering complex service activities/assessments in order to meet or identify customer needs and develop own skills and experience.
- Provide advice and support to customers using Council procedures and policies.
- Where appropriate supervise the tasks and activities of other team members including prioritising and scheduling of work.

Budgetary accountabilities

- None

Specific accountabilities

- To manage Appointeeship and Deputyship referral cases liaising with all Care Providers concerned to decide appropriate action of referral ensuring stringent audit requirements are followed. To manage clients in a proactive manner with the ability to deal with reactive situations in the absence of a social worker and always be mindful to risk of personal safety.
- To open bank accounts on behalf of clients and manage payments and personal spending. Take appropriate action to resolve any outstanding debts and provide statements when required. To manage and forward plan clients' personal allowance via cash card accounts or the petty cash system.
- To manage clients accounts in accordance with Commission for Social Care Inspection, internal auditors and to ensure clients' records are accessible as appropriate to outside enquiries such as solicitors and Borough Treasury.
- To ensure Deputyship Clients are visited twice a year and financial reports are completed as set out by the Court of Protection.
- To register the Deputyship with individual private banks, building societies, pension companies and share companies.
- To ensure the correct Personal Protective Equipment is worn / used and Risk Assessments are completed prior to visiting empty properties. To liaise with Auctioneers, House Clearance companies and Estate Agents prior to the sale of a property to ensure the best advice is obtained regarding the property. To liaise with Legal throughout property sales ensuring all procedures are followed.
- To be responsible for finalising deceased clients in a timely manner in accordance with Audit requirements.
- To refer cases to Treasury Solicitors if necessary ensuring all procedures are followed.

Person specification (knowledge, skills, experience and behaviours required in the role)

- General knowledge of disability and ill health benefits (The Department for Work and Pensions)
- Good communication skills
- Computer literate (excel word etc)
- Financial experience or minimum GCSE C or equivalent in Maths and English
- Ability to work independently and as part of a team with a flexible approach to the working day.

Ensure all health and safety standards are adhered to for the relevant work area

- Apply diversity and equal opportunities policies in the workplace
- Ensure all Data Protection Policies are adhered to.