

**Manchester City Council
Role Profile**

**Client Finance Officer, Grade 6
Financial Management, Corporate Services
Reports to: CFS Team Leader
Job Family: Transactional Back Office**

Key Role Descriptors:

The role holder will provide expertise and support in delivering excellent transactional back office support to the residents of Manchester and stakeholders.

The role holder will monitor, evaluate and report on the quality of output from a transactional team with a focus on the continuous improvement of service delivery and contribution to service performance targets.

Key Role Accountabilities:

Develop and maintain a high level of expertise in respect of relevant law, policy, good practice, procedures and systems. Support and coach colleagues in these areas and develop the team in general in its understanding and use of legislation, case-law and good practice in these areas.

Analyse and interpret feedback and management information and proactively develop recommendations for improvement in line with best practice in a way that supports service priorities and objectives.

Work collaboratively across the wider Council, providing specialist advice, information, support and challenge to support client services to meet the objectives outlined in business plans and the effective delivery of organisational objectives.

Proactively assist the monitoring and review processes and procedures to ensure that key performance indicators are met and implement strategies and procedures to continually enhance the service.

Provide advice and guidance to colleagues across the organisation in area of specialism.

Roles at this level may be required to undertake management duties, either through direct line management of a team (including appraisals, performance management and other duties) or through matrix management of a virtual team of officers.

Personal commitment to continuous self development and service improvement.

Through personal example, open commitment and clear action, ensure diversity is positively valued, resulting in equal access and treatment in employment, service delivery and communications

Where the roleholder is disabled every effort will be made to supply all necessary aids, adaptations or equipment to allow them to carry out all the duties of the role. If, however, a certain task proves to be unachievable, job redesign will be given full consideration.

Role Portfolio:

The role holder will work as part of the Client Financial Services team, contributing to the delivery of a high quality, compliant and customer focused service for citizens subject to appointeeship and deputyship arrangements.

The role holder will manage a full caseload of customers, taking responsibility for the day to day financial administration and safeguarding of vulnerable adults who lack mental capacity to manage their own affairs. This includes the proactive management of income, expenditure, welfare benefits, debts, savings, investments and assets.

Client Finance Officers will be responsible for ensuring accurate, timely and secure financial management across all cases, maintaining robust records, audit trails and compliance with statutory and organisational requirements.

The role requires the development and maintenance of effective working relationships with internal colleagues and a wide range of external stakeholders, including social workers, Legal Services, Charging Team, care providers, the Department for Work and Pensions, the Court of Protection, the Office of the Public Guardian, banks and other financial institutions.

The role holder will act as an advocate for customers, representing their financial interests and ensuring that all actions are undertaken lawfully and demonstrably in their best interests, in line with the Mental Capacity Act, DWP guidance and Court of Protection requirements.

All work will be undertaken in accordance with relevant legislation, policy and professional standards, ensuring that customers are protected from financial risk, abuse or exploitation and that the Council meets its statutory responsibilities as Appointee and Deputy.

Key Responsibilities

- Manage an assigned caseload of appointeeship and deputyship clients, ensuring their financial affairs are safeguarded and managed in accordance with legislation, policy and best interest principles
- Maximise and manage customers' welfare benefit entitlement, including making applications, reporting changes in circumstances, challenging decisions and progressing appeals where appropriate
- Monitor, control and reconcile customer income, expenditure, assets, investments and debts, ensuring financial sustainability and preventing financial risk
- Prepare and maintain accurate financial and administrative records, ensuring compliance with audit requirements, statutory reporting and organisational standards

- Undertake all banking, payment and reconciliation activities, including setting up and managing direct debits and standing orders, monitoring accounts and resolving discrepancies
- Assess cases for deputyship requirements, prepare supporting information and work with Legal Services to progress Court of Protection applications
- Implement and manage deputyship arrangements following Court Orders, ensuring compliance with Office of the Public Guardian standards, including completion of annual reports
- Liaise effectively with internal teams and external organisations, acting as the Council's representative and advocating on behalf of customers in financial matters
- Investigate and resolve financial issues, including challenging incorrect charges, negotiating with creditors and addressing discrepancies or risks to customer finances
- Support best interest decision making by providing financial analysis and advice to social work teams and other professionals
- Identify and respond to safeguarding concerns related to financial abuse, ensuring appropriate actions are taken in line with statutory responsibilities
- Plan and prioritise workload to meet statutory deadlines, service standards and competing demands across a complex caseload
- Provide advice and guidance on processes, policy and legislation to colleagues and stakeholders, supporting effective service delivery
- Contribute to service improvement by identifying opportunities to enhance processes, systems and customer outcomes

Key Behaviours, Skills and Technical Requirements

Our Manchester Behaviours

- We work together and trust each other
- We're proud and passionate about Manchester
- We take time to listen and understand
- We 'own it' and aren't afraid to try new things
- We show that we value our differences and treat people fairly

Generic Skills

- **Communication Skills:** Demonstrates an understanding of the views of others and communicates in a realistic and practical manner using appropriate language and medium, listens attentively to views and issues of others and responds to issues arising. Ability to influence or persuade immediate departmental or functional colleagues.
- **Analytical Skills:** Ability to engage with stakeholders to identify information needs and to know how to go about obtaining the relevant information. Able and confident to resolve moderately complicated queries in their area of knowledge using logical thinking to explain reasoning behind decisions or actions taken.
- **Planning & Organising:** Demonstrate the ability to organize multiple tasks in the most effective way, and allocate time and energy according to task complexity and priority
- **Problem Solving & Decision Making :** Is able to make effective decisions on a day-to-day basis, taking ownership of decisions, demonstrating sound judgement in escalating issues where necessary. Be logical in thinking and explain reasoning behind decisions or actions taken
- **Strategic Thinking:** Understands the importance of organisational strategy and how they contribute to it
- **ICT Skills:** Skills to use ICT systems to obtain and analyse data and present it effectively through a variety of ICT channels.
- **Administrative Skills:** Good level of literacy and numeracy skills to undertake calculations and produce letters and other documentation
- **Financial Management:** Ability to work confidently with financial data and make decisions using appropriate financial information, interpreting trends and accounting for risk. Ability to monitor expenditure against budget, prepare forecasts, identify and understand variances. Numeracy and accuracy skills to handle numbers confidently, collate information and keep accurate and reliable records to help with the monitoring and reviewing of financial resources.

Technical Requirements (Role Specific)

- Good knowledge, experience and understanding of financial processes.
- Good basic knowledge and understanding of Adult Social Care.
- Detailed knowledge and proven work experience of the Welfare Benefits system and assessing benefit entitlements.