

DARLINGTON BOROUGH COUNCIL

RESOURCES

JOB DESCRIPTION

<u>POST TITLE :</u>	Financial Assessment Team Leader
<u>BAND :</u>	9
<u>JOB EVALUATION NO.</u>	C2146
<u>REPORTING RELATIONSHIP</u>	Finance Manager
<u>JOB PURPOSE :</u>	To manage a highly effective service within the Financial Assessment team and oversee the day-to-day operation of the team.
<u>POST NO.</u>	POS001325
<u>PDR COMPETENCY FRAMEWORK</u>	Level 2, Core Management Competencies for all managers

MAIN DUTIES/RESPONSIBILITIES

1. Effectively plan and manage the day to day activities of the Financial Assessment Team, to ensure work is carried out in the most effective and efficient manner and to develop links and provide support and advice to operational staff on financial assessment matters.
2. Carry out audit and quality control of data input.
3. Lead on the management of any enquiries and ensure that they are dealt with effectively, efficiently, and accurately.
4. Ensure all relevant assessment are completed in a timely manner to ensure that individual's invoices are raised as soon as possible.
5. Lead on the allocation of work to the financial assessment team and monitor and provide reports on the performance of the team,
6. Ensure financial assessment are finalised in the payments and income system to ensure that invoices are raised in a timely manner.
7. Lead on the production of accurate clients invoices for both residential and non-residential services, including the balancing of these accounts to the local authority's financial management system.
8. Ensure that deferred payments are recorded accurately and individual reports are distributed at regular intervals.

9. Provide guidance and advice in respect of complex financial cases and first stage of appeals/complaints.
10. Be responsible for the advice and guidance provided by the financial assessment team to staff, stakeholders, vulnerable clients and carers across both adults and children's services.
11. Develop and review policies, procedures and systems for financial assessment functions within the department and evaluate their implementation.
12. To develop, review, revise and implement variations to the relevant charging policies.
13. Prepare and contribute to reports for Cabinet, senior management and colleagues as required.
14. Be responsible for the production and distribution of information relevant to the financial assessment function, both to internal and external stakeholders.
15. Assist in the provision of information as is required by members, other departments, the council's external auditors, government departments and other agencies, for both internal and external reporting purposes.
16. Ensure probity; cost effectiveness and compliance with the relevant adult services financial practices and procedures.
17. Develop, review and maintain working documentation and information to the public to reflect changes in procedure or legal changes.
18. Promote effective communication with internal and external customers.
19. Keep up to date with current legislation and provide good professional practice at all times.
20. Assist in the preparation of the annual service plan and ensure the team's aims and objectives are achieved.
21. Work unsupervised and take responsibility for own workload, dealing with complex issues and delegating work as appropriate.
22. Undertake specific assignments as directed by Finance Manager.

General

23. Ensure own personal development through the Performance Development Review process.
24. Ensure that the PDR process operates effectively within your team and end of year reviews are completed and submitted to the Council's timescales.
25. Manage your team in line with all the Council's policies and procedures and ensure that employees are aware of their obligations under these.

26. Ensure that the Council's Equality agenda is implemented effectively in your team and to carry out your duties as a manager and employee in line with these.
27. Safeguard and promote the welfare of vulnerable adults and children for whom you have responsibility, or with whom you come into contact, to include adhering to all specified procedures.
28. Ensure that you work in line with all the Council's policies and procedures and ensure that you are aware of your obligations under these.
29. Behave according to the Employees' Code of Conduct and ensure that you are aware of your obligations and responsibilities re: conflicts of interest, gifts, hospitality and other matters covered by the Code.
30. To comply with health and safety policies, organisational statements and procedures, report any incidents / accidents/ hazards and take a pro-active approach to health and safety matters in order to protect yourself and others.
31. Any other duties of a similar nature related to this post that may be required from time-to-time.
32. Darlington Borough Council and schools within the Borough are committed to safeguarding and promoting the welfare of children and expects all staff and volunteers to share this commitment.
33. This post is deemed to be a 'Customer Facing' role in line with the definition of the Code of Practice on the English language requirement for public sector workers.
34. This post is subject to an enhanced disclosure. The successful applicant will be subject to the relevant vetting checks before an offer of appointment is confirmed. Following appointment the employee will be subject to rechecking as required from time to time by the Council.
35. To fulfil your health and safety management role as detailed in both Corporate and Group Health and Safety Policies, organisational statements and procedures to ensure a safe working environment for yourself, members of your team and others who may be affected by your team's activities.

Date: July 2019

DARLINGTON BOROUGH COUNCIL
FINANCIAL ASSESSMENTS TEAM LEADER

RESOURCES

POST NO. POS001325

All appointments are subject to satisfactory references.

Criteria No.	Attribute	Essential (E)	Desirable (D)
	Qualifications & Education		
1	BTEC Higher National Certificate, NVQ 4 (or equivalent) in a field relevant to the post.		D
	Experience & Knowledge		
2	Experience in a financial environment.	E	
3	Experience of relating financial information to service users and staff from a non-financial background.	E	
4	Experience of co-ordinating and monitoring financial and administration systems and procedures.	E	
5	Knowledge and understanding of Financial Assessments.	E	
6	Knowledge and understanding of issues facing an adult services department.		D
7	Knowledge of adult social services financial systems and procedures.		D
8	Working knowledge and experience of the local authorities Charging policies.		D
9	Experience of working with service users and carers, external agencies and services providers.		D
10	Knowledge and understanding of Social Care Legislation.		D
11	Experience of confidently communicating with the public and other stakeholders on a day to day basis	E	
12	Experience of supervising and leading a team, including motivation, advice, guidance and performance development.	E	
13	Experience of staff supervision, including performance development.		D
	Skills		
14	Ability to effectively communicate both orally and in writing to a wide range of audiences (including ability to write clear and concise reports & presentations)	E	
15	Ability to work under pressure, organise work and plan tasks to meet deadlines.	E	
16	Ability to use initiative and make decisions outside immediate policy and procedures and without reference to a manager	E	
17	Ability to develop policies, procedures and systems and evaluate their implementation.	E	
18	Ability to prioritise workload and to plan and allocate tasks to meet deadlines.	E	
19	Ability to interpret figures with skill and understanding and carry out financial calculations.	E	
20	Ability to work successfully as part of a team and on own initiative.	E	

21	Understanding of computer systems and competency in Office Applications e.g. MS Word/Excel and office packages, including spreadsheets.	E	
22	Ability to work to a high degree of accuracy with attention to detail.	E	
23	Ability to monitor finance and ensure charging deadlines are achieved in accordance with council procedures and carry out relevant audit requirements.	E	
24	Able to demonstrate advanced level IT skills.		D
	Personal Attributes		
25	Commitment to a high quality service delivery and continuous improvement.	E	
26	Commitment to personal development and willing to expand knowledge and experience	E	
27	Ability to maintain confidentiality	E	
	Special Requirements		
28	The ability to communicate at ease with customers and provide advice in accurate spoken English	E	
29	Capable of independent travel to carry out the requirements of the post	E	