Role profile

**Client Funds Officer**

**Our values:**

**We are dedicated, respectful, collaborative. We are Milton Keynes City Council.**

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| **Service** | Finance Transactions |
| **Reports to** | Client Funds Team Leader |
| **Job family** | Professional and Technical |
| **Grade** | E |
| **Political restricted?** | N |
| **DBS required?** | Y - enhanced |
| **Date** | August 2024 |
| **JE Code** | JE2652 |

Key deliverables

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| **1** | Responsible for day-to-day management of service users’ affairs, in line with current legislation and policies, making sound judgements / decisions.  Work closely with the Team Leader, Senior Client Funds Officers and Corporate Deputy, keeping them informed of service user, process, system or performance issues and take responsibility for resolving issues or recommending options for resolving them as appropriate. |
| **2** | Manage and maintain own case load, including correspondence, making payments, providing emergency funds, claiming benefits to maximise a service users income, negotiating agreements debt settlement and reporting information to relevant stakeholders. Supporting the Senior Client Funds Officer and service users with issues in order to meet the service users and organisations needs. Dealing with property maintenance, ensuring that client property is safe and secure, and house clearance as appropriate which will include inventory checks. Assisting with the administration of estates and funeral arrangements. |
| **3** | Ensure operational services priorities are met and customer and audit requirements are adhered to through effective workflow management. |
| **4** | Respond to and resolve sensitive service request and queries within the agreed service standard and according to operational procedures. |
| **5** | Provide advice and support to other staff, departments and external bodies when dealing with service users affairs and operational procedures. |
| **6** | Attend meetings/visits to complete annual finance reviews, best interest decisions, mediate and resolve issues face to face with internal/external bodies and families. |
| **7** | Manage and prioritise own workload/deadlines, processing information / data accurately and in a timely manner. |
| **8** | Support the Senior Client Funds Officers and Team Leader with developing and implementing process efficiencies through service improvements and system developments. |

*Within reason these key deliverables may evolve to meet service need and it is expected that you will be flexible and adaptable in your delivery to meet both service and city council wide needs*

**Essential requirements** Key skills, expertise, and qualifications

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| **1** | Educated to GCSE level, NVQ Level 3 or experience gained in a similar or related working environment. |
| **2** | Full Driving Licence and ability to travel to visit service users where appropriate. |
| **3** | Good IT skills with good knowledge of Microsoft Office applications. |
| **4** | Ability to communicate with a wide range of service users and internal and external stakeholders. Maintain good working relationships, with the ability to influence and support joint decisions, whilst demonstrating empathy and understanding of a service user. |
| **5** | Ability to understand and interpret national legislation, policies and guidance to ensure processes are compliant with national requirements, working in the best interest of the service users |
| **6** | Ability to work independently scheduling and prioritising own work to meet service requirements and service user requirements |
| **7** | Ability to gather financial and non financial information related to appointeeship and deputyship service users to support applications for benefit, Tribunals, debt negotiations and the production of management information reports. |
| **8** | Proven customer service background with experience of conflict resolution, negotiation and diplomacy skills |
| **9** | Ability to manage and prioritise own workload. Maximising Income for the service user and minimising loss / debts. Dealing with issues, disputes and emergencies; making sound decisions as and when required. Planning the monitoring of service users budgets and future events. |

Job family

**Professional and Technical (Grade E)**

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| --- | --- |
| **Colleague expectations**   * Be professional at all times * Work together for the good of the team, city council and local people * Promote a supportive culture * Challenge assumptions * Take ownership * Be willing to change and do things differently * Always work in a safe manner | **Manager expectations**   * Be a role model by displaying positive behaviours at all times * Make well-considered decisions * Support, coach and communicate with my team * Be accountable for my team’s performance |

Professional and Technical job holders rely upon their deep knowledge of the specialism or discipline in which they work to carry out vital tasks and provide authoritative advice to others. Often developing within recognised career paths, their evolving expertise sees them bear increasing responsibility for managing city council assets, the development of policies and procedures and the strategic direction of the functions they support.

This element of the profiles, taken from the job family descriptor for this grade, provides a general understanding of the level of work and demands required.

**Role characteristics**

At this level the experience and technical expertise of job holders enables them to carry out a range of complicated tasks and provide authoritative technical and procedural advice to colleagues and members of the public. They will monitor and take responsibility for a range of city council assets and will plan work outputs and project deliverables several weeks in advance.

**The knowledge and skills required**

The range of knowledge required for these roles includes an understanding of the policies and procedures across the specialist area in which job holders work as well as a solid underpinning of technical knowledge gained through dedicated, formal education.

Usually job holders have been working within the specific field for a reasonable time and they have been exposed to many of the routine and more unexpected circumstances of their role.

This level is also appropriate for jobs requiring graduate or post graduate qualifications in a specific discipline, but which will not yet have the on the job experience necessary for full practitioner level expertise.

While the majority of roles will have demands for manual dexterity in relation to typing and similar functions, other jobs will use a range of equipment requiring precision in their use and handling.

**Thinking, planning and communication**

Job holders will need to make judgements and creative choices related to the tasks they carry out and the advice or guidance they give others. Problems are likely to crop up quite regularly and their solutions will come from both standard practice guidelines and reliance upon jobholders’ technical expertise in their particular discipline.

Job holders will deal with many day-to-day issues but will also be required to plan ahead several weeks ahead to achieve personal and team goals.

At this level, the information exchanged with internal and external colleagues, and members of the public will call for developed communication skills on the part of the job holders. Matters will be technically complicated, requiring careful explanation, or sensitive, requiring significant listening skills to interpret information and provide appropriate advice.

**Decision making and innovation**

Job holders enjoy some autonomy in determining the best practical approach to meeting goals and targets. Although working in a team context where working to recognised procedures ensures consistency, they will need to respond independently to unexpected problems and situations, referring particularly unusual or difficult issues to a manager.

**Areas of responsibility**

At this level, rather than provide a straightforward service to others, job holders will need to carefully assess their specific needs and tailor their response appropriately. Alternatively, some roles will be responsible for implementing regulations in such areas as public health, housing or democratic governance.

There will be no supervisory responsibility at this level, but job holders may assist with the orientation of new starters, volunteers or students.

OR:

Supervisory duties are an element of jobs but there will generally be a compensating reduction in the requirement to assess the needs of service users and/or accountability for financial and physical resources.

Given the diversity of jobs, the specific nature of responsibilities will depend upon the needs of the team. These are likely to be financial accountability at the level of regular cash handling or monitoring/ spending from an agreed budget and the careful use and maintenance of significant city council assets such as vehicles, equipment, information and resources.

**Impacts and demands**

Tasks and duties will be generally carried out in a sedentary position but there will always be a requirement for standing and walking from time to time, and the occasional need to lift or carry items.

The problem solving and decision-making elements of these jobs mean that job holders require lengthy periods of enhanced mental attention to attend to duties, while also dealing with deadlines, interruptions and conflicting demands.

Duties of jobs at this level will not require job holders to develop and maintain working relationships with people who, through their circumstances or behaviour, place particular emotional demands on the job holder.

Many Professional and Technical job holders find themselves exposed to some disagreeable, unpleasant or hazardous working conditions. Particularly when the needs of their specialism require them to work on external sites exposed to the weather, in or around refuse and waste plant, close to particularly noisy machinery and in similar environments. Other jobs, such as enforcement roles, may also see job holders exposed to verbal abuse and threatening environments. In all cases, job holders will minimise risk and conform to health and safety regulations to mitigate any negative effects of such exposure.