

Kent County Council

Job Description: *Client Financial Services Senior Officer*

Directorate:	Strategic and Corporate Services
Unit/Section:	Finance, Client Financial Services
Grade:	KR8
Responsible to:	Client Financial Services Team Manager

Purpose of the Job:

Client Financial Services implement policies and legislation associated with the financial requirements of supporting clients known to Adult Social Care and Health. This role plays a key part in the provision of high-quality administrative financial support to customers, many of whom are vulnerable and have complex needs.

Client Financial Services consists of eight teams. This post will require you to work in either the Assessment Team, Financial Affairs Team or Debt Recovery Team, although flexibility will be required to support all teams dependant on customer demand.

A Client Financial Services Senior Officer should provide a first-class customer service to colleagues within the Council and external customers of the Authority, handling customer enquires face to face, over the telephone, internet or email, giving information and resolving queries.

Main Duties and Responsibilities:

- Build rapport and handle customer enquiries effectively across a number of different services via all contact methods including face to face using highly developed communication and analytical skills. Where appropriate signpost customers appropriately for further support as required e.g. Debt Management Advice, benefits entitlement and a variety of invoice enquiries. Deal sensitively and manage challenging situations with customers.
- Develop an in-depth level of knowledge of relevant policy, legislation and associated processes within the Client Financial Services function in order to provide expert advice on complex matters.
- Interpret and analyse diverse information and provide customers, internal and external stakeholders with relevant expert advice and support to their in-depth enquiries, using data, systems and knowledge. Produce reports required to support decision making across Client Financial Services.
- Use specialist knowledge to identify that client contributions for care and support services are accurate and in line with the Council's Charging Policy and personal budgets. Be able to identify and lead for welfare benefit entitlement. Work in conjunction with our partners i.e. Office of Public Guardianship (OPG), Debt Management companies and the Department for Work and Pensions (DWP) to ensure positive outcomes in relation to the financial wellbeing of clients known to Adult Social Care.

- Establish a customer's welfare and financial circumstances by sensitively challenging information shared, to include safeguarding (financial abuse) and potential cases where deprivation of capital has occurred, making recommendations and reporting through the escalation process as appropriate.
- Respond positively and champion individual, team and service objectives in line with performance standards and targets.
- Undertake any other ad hoc responsibilities aligned with the overall purpose and grade of the role.
- Ensure income due to the Authority is maximised and debt collected in accordance with the Authority's processes and policy. Lead for complex cases e.g. appealing benefit decisions, unresolved disputed debts and safeguarding.
- Prepare and deliver specialist advice and guidance when commissioned through a variety of means for example presentations and tutorials.

Footnote: This job description is provided to assist the job holder to know what his/her main duties are. It may be amended from time to time without change to the level of responsibility appropriate to the grade of post.

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Person Specification: *Client Financial Services Senior Officer*

The following outlines the criteria for this post. Applicants who have a disability and who meet the criteria will be short-listed.

Applicants should describe in their application how they meet these criteria.

	CRITERIA
QUALIFICATIONS	<ul style="list-style-type: none">• Educated to minimum GCSE level 4 in English and Mathematics or equivalent.• Educated to minimum A level or NVQ Level 3 in Business Administration or another relevant subject or equivalent.• Hold or be willing to complete an Accounting / Management Qualification.
EXPERIENCE	<ul style="list-style-type: none">• Experience of delivering service excellence to customers, with the ability to provide information and advice in a sensitive and understanding manner.• Experience in a financial environment e.g. Banking, Financial Reconciliations, Credit Control or Performance Monitoring.• Experience of working in a customer focussed setting such as Welfare Benefits, Citizens Advice, Office of the Public Guardianship or Local Authority.• Experience in mentoring, supporting colleagues and championing new initiatives.
SKILLS AND ABILITIES	<ul style="list-style-type: none">• A positive individual who engages well with colleagues and fosters excellent team spirit.• Able to travel to different work locations when required. Willing and available to work flexibly across the opening hours of the service according to changing demand.• Work on own initiative and as part of a team. Provide support and guidance, share experiences with colleagues.• Ability to deliver in a target led environment.• Understand and apply relevant policy and legislation.• Demonstrate personal resilience when working in an environment of pressure and constant change.• Able to effectively manage customer enquiries, adapting communication style as required.• Ability to sensitively manage challenging situations and difficult conversations.• Ability to build rapport and trust with a diverse range of

	<p>customers and stakeholders in a professional and responsive manner.</p> <ul style="list-style-type: none"> • Ability to prioritise, be flexible and arrange workloads to meet targets and respond effectively to fast paced transformation. • Ability to work professionally in conjunction with other public bodies e.g. Office of the Public Guardianship (OPG), independent financial advice and Department for Work and Pensions (DWP). • Confidence to challenge existing ways of working and suggest ideas for improvement. • Ability to analyse and interpret complex data, providing clear and accurate advice to customers regarding their individual situation. • Ability to champion and deliver individual and team service objectives in line with performance standards and targets. • Ability to effectively manage complaints, adapting communication style as required. • A proven ability to carry out detailed investigations. • Be able to deliver business critical activity as required. • Ability to supervise, support and provide direction to team members.
KNOWLEDGE	<ul style="list-style-type: none"> • Awareness of Kent County Council and awareness of the role of Adult Social Care within Local Government. • Working knowledge of Microsoft Applications. • Detailed understanding of managing a client's finances. • Detailed knowledge and understanding of the General Data Protection Regulation (GDPR) • Awareness of the Care and Support Statutory Guidance (CASS). • Detailed working knowledge of the welfare benefits. • Detailed understanding of Kent County Council Debt Policy.
BEHAVIOURS AND KENT VALUES	<p>Kent Values:</p> <ul style="list-style-type: none"> • Open • Invite Contribution and Challenge • Accountable <p>And</p> <p>Exhibit the Finance behaviours of:</p>

	<ul style="list-style-type: none">• Make it Happen• Commercial Perspective• Water for Growth• Break the Barriers• Be Kind
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Kent Values and Corporate Finance Behaviours

Kent Values required of all staff:

Be Open	<ul style="list-style-type: none"> • Act with integrity, honesty and transparency. • Demonstrate a health attitude to risk. • Welcome and expect change and evolving technology. • Work in new ways. • Be willing to learn. • Work as a whole council. • Treat people fairly and with respect.
Invite contribution and challenge	<ul style="list-style-type: none"> • Work collaboratively to find new solutions. • Innovate. • Put the interests and wellbeing of customers first. • Be open to challenge. • Actively encourage and expect contribution.
Accountable	<ul style="list-style-type: none"> • Do more for yourself. • Take personal and professional responsibility for your actions and performance. • Deliver at pace. • Look for ways to save money. • Look for commercial opportunities. • Focused on outcomes.

Exhibit the Corporate Finance behaviours of:

<p>We all need to take a step back and think about our own wellbeing and the wellbeing of those around us.</p> <p>‘Be Kind’ is a reminder that we are One Finance and with everything that we do, there is never a reason to not be kind!</p>	<ul style="list-style-type: none"> • Take notice of those around you and Ask Twice if someone is acting differently. • Eat well and be active. • Give – do something nice for a colleague. • Value one another. • Don’t suffer in silence! You are never alone. • Kindness and looking out for each other cost us nothing. • Help a person in need, a problem shared is a problem halved.
<p>In a large organization you can sometimes feel alone. Whatever problem you are facing, in Finance we strive to tackle them together.</p> <p>By offering our combined knowledge, skills and help, we can Break down any Barriers (Break the Barriers) in any way.</p>	<ul style="list-style-type: none"> • Embrace new technologies and ideas. • Offer and accept help. • If you are an expert in your field, share your knowledge. • Challenge the way we work, is there a better way? • Get people involved and co-operate across teams. • All ideas and points of view are worthwhile.
<p>Commercial Perspective isn’t just about saving money! It is about being business like in our approach to both colleagues and customers.</p>	<ul style="list-style-type: none"> • Treat every £ as it is was your own. • Put the customer at the heart of every decision. • If it doesn’t add value, why are we doing it? • Continually improve our systems and processes.

<p>Ask yourself this, would you always act the same way if KCC was your own business?</p>	<ul style="list-style-type: none"> • Seek opportunities to generate income for KCC. • Listen to and act on customer feedback promptly.
<p>There is always a time when you just need to get the job done. Make it Happen is the behavior that takes you across the finish line and avoids stopping when things get difficult.</p> <p>A positive mindset will more often than not lead to positive results!</p>	<ul style="list-style-type: none"> • Don't put off tomorrow what you can do today. • Everyone can lead by example not just management. • Be a 'first follower', people will join you! • Use initiative to seek solutions for problems, without being asked. • Don't let work go undone because its 'not my job', find out who's it is. • If you go the extra mile, in KCC finance we will recognize this.
<p>In Finance we want you to reach your potential but not overburden you to the point that you start to sink.</p> <p>Water for Growth is about bringing everybody on, not just the select few, so that we feel ready to take on the next challenge.</p>	<ul style="list-style-type: none"> • Don't blame others, if someone makes a mistake help them learn from it. • Give your staff the space and time to develop. • Look out for and support those who are overstretched. • Provide equal opportunities. • Actively seek tasks that take you out your comfort zone. • Give positive feedback for a job well done or even 'fantastic failures'.