

# Kent County Council

## Job Description: *Client Financial Services Senior Officer*

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<b>Directorate:</b>	Strategic and Corporate Services
<b>Unit/Section:</b>	Finance, Client Financial Services
<b>Grade:</b>	KR9
<b>Responsible to:</b>	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, Business Support Team or Customer Relationship 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:**

- Handle customer enquiries effectively, and where possible at first point of contact, across a number of different services involving different methods of communication: face to face, telephone, letter and by email. Represent the Function in the provision of expert advice to customers and deliver robust support and accurate advice to all types of enquiry using data, systems and knowledge; e.g. benefits entitlement, invoicing queries, ad-hoc reporting and complaints.
- Lead for the provision of support and guidance on complex financial assessments under the Council's Charging Policies. In accordance with legislation, procedures and timescales to ensure the Council is charging promptly and accurately for clients receiving care through the council.
- Ensure all benefit maximisation opportunities have been identified and progressed. Maximise income for the Council by ensuring clients are reassessed correctly and promptly following changes in financial circumstances. Contribute to the successful delivery of the annual financial reassessment of clients receiving services throughout the Council.
- Able to establish a customer's welfare and financial circumstances by challenging information shared. This will include potential safeguarding (financial abuse), cases where deprivation has been identified and complex complaint cases. Escalate and be involved in the decision-making process for resolving these cases.
- Provide data around Performance Management, highlighting where issues are predicted or where there may be issues with performance and take a proactive approach in the resolution of issues. Lead for Financial reconciliations.
- Be responsible for systems support, testing and enhancements and for the quality assurance of data produced within the Client Financial Services Function.

- Be responsible for the integrity of the data produced that is used to analyse and interpret information. Be accountable for the data provided which can lead to changes in policy.
- Work in conjunction with internal and external stakeholders to ensure positive outcomes in relation to the financial wellbeing of clients known to Adult Social Care.
- Lead for investigations into Complaints, Freedom of Information Requests and Data Breaches. Make recommendations in respect of lessons learnt to ensure continuous improvement. Ensure the Function is compliant with Council Policy and GDPR Regulations.
- Be able to lead, supervise and direct in the absence of the Team Manager for the continued successful performance of the team.

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
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"><li>• Educated to minimum GCSE level 4 in English and Mathematics</li><li>• Educated to minimum A level or NVQ Level 3 in Business Administration or another relevant subject.</li><li>• Hold or be willing to complete an Accounting / Management Qualification.</li></ul>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"><li>• Experience of delivering service excellence to customers, with the ability to provide information and advice in a sensitive and understanding manner.</li><li>• Experience in a financial environment e.g. Banking, Financial Reconciliations, Credit Control or Performance Monitoring.</li><li>• Experience of working in a customer focussed setting such as Welfare Benefits, Citizens Advice, office of the Public Guardianship or Local Authority.</li><li>• Experience in mentoring, supporting colleagues and championing new initiatives.</li></ul>
<b>SKILLS AND ABILITIES</b>	<ul style="list-style-type: none"><li>• A positive individual who engages well with colleagues and fosters excellent team spirit.</li><li>• 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.</li><li>• Work on own initiative and as part of a team. Provide support and guidance, share experiences with colleagues.</li><li>• Ability to deliver in a target led environment.</li><li>• Understand and apply relevant policy and legislation.</li><li>• Demonstrate personal resilience when working in an environment of pressure and constant change.</li><li>• Able to effectively manage customer enquiries, adapting communication style as required.</li><li>• Ability to sensitively manage challenging situations and difficult conversations.</li><li>• Ability to build rapport and trust with a diverse range of customers and stakeholders in a professional and responsive manner.</li><li>• Ability to prioritise, be flexible and arrange workloads to meet targets, and respond effectively to fast paced transformation.</li><li>• Ability to work professionally in conjunction with other public bodies e.g. Office of the Public Guardianship (OPG), independent</li></ul>

	<p>financial advice and Department for Work and Pensions (DWP).</p> <ul style="list-style-type: none"> <li>• Ability to analyse and interpret complex data, provided clear and accurate advice to customers regarding their individual situation.</li> <li>• Ability to champion and deliver individual and team service objectives in line with performance standards and targets.</li> <li>• Ability to effectively manage complaints, adapting communication style as required.</li> <li>• A proven ability to carry out detailed investigations.</li> <li>• Be able to deliver business critical activity as required.</li> <li>• Ability to supervise, support and provide direction to team members.</li> <li>• Analytical skills to interpret and present complex financial data and produce information for a wide audience.</li> <li>• Ability to deliver focussed based outcomes as a result of the interpretation of financial data.</li> <li>• Ability to represent the function in a professional capacity with internal and external stakeholders.</li> <li>• Excellent at coaching, championing and mentoring.</li> <li>• Ability to challenge current ways of working through negotiation and recommendation.</li> </ul>
<b>KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>• Awareness of Kent County Council and awareness of the role of Adult Social Care within Local Government.</li> <li>• Working Knowledge of Microsoft Applications.</li> <li>• Detailed understanding of managing a client's finances.</li> <li>• Detailed knowledge and understanding of the General Data Protection Regulation (GDPR).</li> <li>• Detailed understanding of current legislation i.e. Care and Support Statutory Guidance (CASS) impacting on Adult Social Care and an appreciation as to how this impacts across the Authority.</li> <li>• Detailed working knowledge of the welfare benefits.</li> <li>• Detailed knowledge of the IT systems used across Client Financial Services.</li> <li>• Detailed understanding of Kent County Council Debt Policy.</li> </ul>
<b>KENT VALUES AND CULTURAL ATTRIBUTES</b>	<p><b>Kent Values:</b></p> <ul style="list-style-type: none"> <li>• We are <b>brave</b>. We do the right thing, we accept and offer challenge</li> <li>• We are <b>curious</b> to innovate and improve</li> <li>• We are <b>compassionate</b>, understanding and respectful to all</li> <li>• We are <b>strong together</b> by sharing knowledge</li> <li>• We are all <b>responsible</b> for the difference we make</li> </ul> <p>Our values enable us to build a culture that is:</p>

	<p><b>Flexible/agile</b> – Willing to take (calculated) risks and want people that are flexible and agile</p> <p><b>Curious</b> – Constantly learning and evolving</p> <p><b>Compassionate and inclusive</b> – Compassionate, understanding and respectful to all</p> <p><b>Working Together</b> – Building and delivering for the best interests of Kent</p> <p><b>Empowering</b> – Our people take accountability for their decisions and actions</p> <p><b>External Focused</b> – Residents, families and communities at the heart of decision making</p>
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