

**Leeds City Council**  
**Financial Management**

**Job Description**

<b>Job Title:</b>	Finance Officer	<b>Salary</b>	£
<b>Accountable to:</b>	Senior Finance Officer Direct Payments - Operations	<b>Grade</b>	C1 - C3
<b>Leadership Area:</b>	Financial Management	<b>Date:</b>	December 2008

**Job Purpose:**

To assist with the provision of a comprehensive financial support service to the Operational Finance team within Adult Social Care Directorate.

**Context:**

The overarching aim is to ensure a co-ordinated and consistent approach to the provision of financial services city wide by:

- Provide senior managers, budget holders and staff with financial information, guidance and advice in relation to a customer's Direct Payment and personal budget monies, to enable them to take responsibility to effectively manage their revenue budgets and to align available resources to priorities.
- Provide financial information and advice to officers and Members to enable them to make better informed decisions in relation to this function.
- Provide comprehensive service to citizens of Leeds in relation to the Audit and monitoring of Direct Payments and Personal Budgets. Including advice to Members and senior officers.
- Aim to maximise the council's financial resources within levels of acceptable risk.
- Promote efficient and effective stewardship of assets and resources.
- Ensure compliance with statutory financial obligations.

**Key Accountabilities:**

- May be required to assist in the supervision a small team of staff within the financial management function of Adult Social Care.
- To assist in the provision of the financial management function for a specific service, supporting the provision of financial advice in relation to a specific area of work.

**Responsibilities: C1**

1. Maintain financial systems for recording income and expenditure in relation to Direct Payments and personal Budgets customers.
2. Deal with telephone queries from customers, their representatives, ASC staff and outside agencies and signpost where appropriate
3. Filing.
4. Set up Direct Payment and Personal Budget information onto the financial system to enable payment implementation.
5. Face to face meetings and ongoing support to customers to enable appropriate audit and monitoring of their Direct Payment / Personal Budget account.
6. Timely and accurate recovery of income owed to the Directorate for services in relation to Direct Payments and Personal Budget payments, dealing directly with the customer to achieve this effectively and with customer care considerations.
7. Assisting with annual financial processes relevant to area of work, including year end accounts.
8. Assist with the Community Care Finance function.

9. Other duties which are commensurate with the grade and within the spirit of the post.

**Additional Responsibilities: C3**

- 7. Resolution of customer and their representatives queries in relation to their Direct Payment / Personal Budget without supervision, which may include written explanations to people without a financial background, requiring well developed communication skills.
- 8. Liaison with stakeholders, customers and officers including advice and information in relation to the administering of a customer's Direct Payment or Personal Budget financial affairs with minimal support.
- 9. Reconcile casework that is more complex.
- 10. Manage own workload with reduced supervision, ensuring you produce work of high quality within agreed timescales.
- 11. Supervisory responsibilities for a team of staff where relevant. This will include being able to explain routine financial tasks and may require you to provide them with on the job training.
- 12. Deputise in the absence of management.

**Economic Conditions:**

Annual Leave:	24 days per annum plus 5 days per annum for 5 years local government service pro rata
Hours:	37 hours per week
Flexitime:	Eligible to participate in flexi-time scheme
Conditions of Service:	NJC Conditions apply

**PROSPECTS**

**Promotion:** Whilst no guarantee can be given to subsequent promotion, there are currently a number of higher graded posts within the Council which potentially provide the opportunity for career progression within the Council. Any subsequent vacancies will be filled in compliance with agreed Council procedures.

**Training:** The Council has a positive commitment to the training and development of employees in all areas of its activities. Similarly employees are also expected to adopt a positive attitude to any training provided and also to their own personal development.

**Physical Conditions Text about where working** - The post will be located in Leeds City Centre or elsewhere within the Leeds Metropolitan District boundary. Leeds City Council has a no smoking policy.

**Prepared by:**

**Date:**

**Approved by:**

**Date:**

**PERSONAL SPECIFICATION ESSENTIAL REQUIREMENTS**

It is essential that the post holder should be able to demonstrate the following criteria for the post within the context of the specific role duties and responsibilities: Candidates will only be short listed for interview if they can demonstrate on the application form that they meet all the essential requirements.

**Method Of Assessment (MOA) – A = Application Form T = Test I = Interview C = Certificate**

**Leadership and Management**

<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
Able to be involved with supervision, training and development of staff including reviewing staff performance through appraisals, (as required) <b>or</b> provided adequate cover in the absence of colleagues	A/I	Be able to explain routine financial tasks to a team of staff where applicable and provide them with on the job training as required	A/I

**Partnership**

<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
Be able to assist in working with external bodies across the public sector including other Local Authorities, Government Agencies, Health bodies and External Audit as required	A/I		

**Change and Service Improvement**

<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
Be able to take responsibility for developing your own performance within the job.	A/I		
Be able to assist in identifying improvements to systems and procedures and contribute to their implementation	A/I		

**Resource, Service management**

<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
Be able to assist in financial support to budget holders aiding them in the management of their service	A/I	Be able to provide written summaries to support financial reports, adding value to the information being provided	A/I

**Governance**

<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
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Appendix 2

Awareness of policies, decision making processes, financial developments and relevant legislation affecting this area of local government responsibility and the impact on services provided by the Council.	A/I		
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<b>Professional and Technical</b>			
<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
To keep abreast of developments in the council's services and the accounting profession as required	A/I	Be able to liaise confidently and effectively with care managers, service users and their representatives, outside agencies and Government Departments with reduced levels of supervision with regard to designated areas of responsibility  Be able to reconcile complex casework.	A/I
Be able to assist with year end processes and closure of accounts	A/I		
Be able to liaise confidently and effectively with care managers, service users and their representatives, outside agencies and Government Departments with regard to designated areas of responsibility	A/I		
Be able to undertake ad-hoc projects / reporting requirements to the required standard	A/I		
Be able to use appropriate level of judgement while undertaking the duties of the role	A/I		
Be able to prepare clear and concise reports and summaries where required (including written reports)	A/I		

<b>Personal Style , Skills and Behaviour</b>			
<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
Ability to demonstrate to use ICT systems including a knowledge of MS Office software.	A/I	Be able to produce high quality work within agreed timescales	A/I
Able to demonstrate use of initiative undertaking the duties of the role	A/I	Be able to manage your workload with reduced levels of supervision	A/I
Able to communicate sensitive Information clearly both orally and in written form to a range of stakeholders.	A/I		
Willing to abide by the Council's Equal Opportunities Policy in the duties of the post, and as an employee of the Council.	A/I		
Willing to take personal responsibility under and abide by the Council's Health and Safety Policy.	A/I		
Commitment to own personal development and learning and that of others	A/I		

<b>Qualifications</b>			
<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
Evidence of numerical and literacy skills e.g. GCSE pass at Grade C or above in English and Mathematics or equivalent (this may include relevant work experience)	A/C		

### **PERSONAL SPECIFICATION DESIRABLE REQUIREMENTS**

It is desirable that the post holder should be able to demonstrate the following criteria for the post within the context of the specific role duties and responsibilities: Candidate are not required to meet all the Desirable requirements however these may be used to distinguish between acceptable candidates

**Method Of Assessment (MOA) – A = Application Form    T = Test    I = Interview    C = Certificate**

<b>Qualifications</b>			
<b>C1 Requirements</b>	<b>MOA</b>	<b>C3 Additional Requirements</b>	<b>MOA</b>
Experience in this or similar area of work would be desirable			

**FINANCIAL MANAGEMENT GRADE C1/C3 - APPRAISAL SCHEME**

**Grade C1** (spinal point 22 to 25) on appointment

**Grade C3** (spinal point 26 to 28)

As part of the annual appraisal process and subject to you performing your key tasks to a satisfactory level, you will be assessed against the following competencies as far as they apply to your role (In more specialist areas additional, predetermined Requirement maybe added). If it is determined that you have demonstrated that you have achieved all of the Requirements on an ongoing basis as part of your work and with limited support and guidance, you will progress to grade C3 at spinal point 26.

<b>Requirements</b>	<b>Evidence</b>	<b>Consistently Demonstrated Y/N</b>	<b>Comments</b>
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Appendix 2

Be able to produce high quality work within agreed timescales			
Be able to manage your workload with reduced levels of supervision			
Be able to liaise confidently and effectively with care managers, service users and their representatives, outside agencies and Government Departments with reduced levels of supervision with regard to designated areas of responsibility			
Be able to provide written summaries to support financial reports, adding value to the information being provided			
Be able to explain routine financial tasks to a team of staff where applicable and provide them with on the job training as required			
Assist line manager in processing a full Appointee/Finance Deputy application, to completion, including appropriate disbursement of a service user's estate			
Maximise the use of computer technology/ systems for the Estates/Deputyship and Pensions functions			
Demonstrate a sound understanding of the political and legal context in which Estates/Deputyship and pensions section operates and communicate this to staff across the Department as appropriate			
Ensure benefit maximisation for Deputyship and pensions clients, including a working knowledge of the impact of pension credits for elderly service users in residential			



Appendix 2

care			
Deal with written correspondence from MPs, Members, Solicitors, Treasury Solicitor, DWP, OPG and the general public, with support from line manager			
Dealing appropriately with aggressive and stressful communications from the public and external organisations/agencies			
Undertake a comprehensive annual reconciliation of the Estates/Deputyship holding accounts with support from line manager			
Assist in the production of an annual Deputy's account to the standard required by the Office of the Public Guardian and the Adult Finance revenue account (OPG)			
Deputise effectively for the line manager during periods of short term absence			

**Appraisee**

**Date**

**Appraiser**

**Date**

**Approving Manager  
(JNC grade)**

**Date**