

Leeds City Council
Financial Management
Job Description

Job Title:	Finance Assistant - Operations	Salary	£
Accountable to:	Senior Finance Officer – Operational Finance Team	Grade	B1/B3
Leadership Area:	ASC – Resources & Strategy	Date:	December 2016

Job Purpose:

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

The Operational Finance Team provide a number of services for Adult Social Care including financial assessments to ascertain client contributions for care services provided, invoicing of assessed client contributions, Deputyship and Estate Management and Audit of Direct Payment Agreements.

Context:

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

- Providing an efficient support service to senior managers, and staff within the Operational Finance Team
- Providing a flexible service and team that are able to be reactive to priorities.
- Providing financial information and advice to officers/Social Workers, clients or their representatives, independent providers and outside agencies, as appropriate within information governance guidance, to enable them to make better informed decisions.
- Aiming to maximise the council's financial resources within levels of acceptable risk.
- Promoting efficient and effective stewardship of assets and resources.
- Ensuring compliance with statutory financial obligations.

Key Accountabilities:

- To assist in the provision of the functions of the Operational Finance Team, supporting the provision of financial advice and support.
- To provide assistance to other finance staff and service managers on related matters
- To provide a flexible support depending upon priorities within the team.

Responsibilities: B1

1. Dealing with incoming mail and it's distribution.
2. Dealing with telephone queries and signposting where appropriate
3. Assisting with the production of letters to clients
4. Filing and scanning appropriate documents
5. Assisting with annual financial processes
6. Ensuring databases and record management systems are updated timely and appropriately
7. Assist with the collection of appropriate information required for financial assessment, DP Audit, income generation or deputyship.
8. Liaison with other Council services and external organisations

9. Production of cheques for service user monies for Deputyship function.
10. Assistance with property searches for the Estates management function.
11. Organising workloads to ensure targets are achieved to performance indicators and service standards.
12. Be committed to safer working arrangements
13. Other duties which are commensurate with the grade and within the spirit of the post.

Additional Responsibilities: B3

12. Explaining financial matters clearly and concisely which may include the provision of training to financial and other staff, using well developed communication skills.
13. Coordination of meetings with Clients or their representatives in respect of Financial Assessments
14. Face to Face meeting with client to ensure appropriate documentation is available for financial assessments, DP Audit, income collection or the deputyship functions
15. Advise on aspects of the Care Act guidance and welfare benefits.
16. Assist in preparing financial information (adding value to financial data) with minimal levels of supervision. This will include extracting and interpreting financial information from various sources including CIS, CIVICA, CASPAR and DWP.
17. Report on potential fraud and safeguarding.
18. Resolving problems of a financial nature with minimal levels of supervision and a reduced need to refer queries to senior officers.
19. Timely and accurate billing of monies owed
20. Assistance with the compilation of statistics for Management Information
21. Assistance with developing systems and procedures to make use of more efficient ways of working.

Economic Conditions :

Annual Leave:	23 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: Matthew James

Date: 22/12/16

Approved by: Cheryl Ward

Date: 22/12/16

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

B1 Requirements	MOA	B3 Additional Requirements	MOA
Assisting with the training of staff (as required)	A/I	Be able to explain, clearly and concisely financial matters or provide basic training to staff	A/I

Change and Service Improvement

B1 Requirements	MOA	B3 Additional Requirements	MOA
To take responsibility for developing your own performance within the job.	A/I	Assistance with developing systems and procedures to make use of more efficient ways of working	A/I

Governance

B1 Requirements	MOA	B3 Additional Requirements	MOA
Awareness of policies, decision making processes, financial developments and relevant techniques affecting local government and the impact on services provided by the Council.	A/I	Advice on aspects of the Care Act guidance and welfare benefits.	A/I

Professional and Technical

B1 Requirements	MOA	B3 Additional Requirements	MOA
Be able to keep abreast of developments in the council's services, the management field and the accounting profession	A/I	Be able to assist in preparing financial information through adding value to financial data with minimal levels of supervision	A/I
Be able to assist with year end tasks and closure of accounts where required	A/I	Assistance with compiling statistical information for Management Information	A/I
Be able to provide appropriate and accurate assistance managing and monitoring processes within the groups	A/I		
Be able to maintain manual and computerised records to a good standard	A/I		
Be able to work to agreed deadlines and targets	A/I		

Personal Style , Skills and Behaviour

B1 Requirements	MOA	B3 Additional Requirements	MOA
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Appendix 3

Ability to demonstrate to use ICT systems including a knowledge of MS Office software	A/I	Be able to resolve problems of a financial nature with minimal levels of supervision	A/I
Able to demonstrate appropriate use of initiative and judgement undertaking the duties of the role Information communicated clearly both orally and in written form	A/I	Be able to demonstrate well developed communication skills and you may be required to use these when explaining financial matters or providing basic training to staff	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	Be able to demonstrate good customer service skills	A/I
Commitment to own personal development and learning and that of others	A/I		

Qualifications			
B1 Requirements	MOA	B3 Additional Requirements	MOA
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		

FINANCIAL MANAGEMENT GRADE B1/B3 - APPRAISAL SCHEME**Grade B1** (spinal point 13 to 17) on appointment**Grade B3** (spinal point 18 to 21)

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 B3 at spinal point 18.

Requirements	Evidence	Consistently Demonstrated Y/N	Comments
Be able to explain, clearly and concisely financial matters or provide basic training to staff			
Assistance with developing systems and procedures to make use of more efficient ways of working			
Advice on aspects of the Care Act guidance and welfare benefits.			
Be able to assist in preparing financial information through adding value to financial data with minimal levels of supervision			
Assistance with compiling statistical information for Management Information			
Be able to resolve problems of a financial nature with minimal levels of supervision			
Be able to demonstrate well developed communication skills and you may be required to use these when explaining financial matters or providing basic training to staff			
Be able to demonstrate good customer service skills			

Appraisee**Date****Appraiser****Date**

Appendix 3

**Approving Manager
(JNC grade)**

Date