

Role Profile

Part A - Grade & Structure Information

Job Family Code	70S	Role Title	Caseworker - Client Financial Affairs Team
Grade	PS7	Reports to (role title)	Assistant Team Manager- Client Financial Affairs Team
		Directorate / School	Adult Social Care
JE Band	228-268	Service / Department	Client Financial Affairs Team
		Date Role Profile was created	June 2021 update (previously August 2015)

Part B - Job Family Description

The below profile describes the general nature of work performed at this level as set out in the job family. It is not intended to be a detailed list of all duties and responsibilities which may be required. The role will be further defined by annual objectives, which will be developed with the role holder. The Council reserves the right to review and amend the job families on a regular basis.

Role Purpose including key outputs	<p>To support the Client Financial Affairs Team function by preparing applications to the Court of Protection on behalf of the Council. The post holder will carry a caseload of deputyship and appointeeship work. The person will also provide advice and support across Adult Social Care on deputyship and appointeeship matters. This may include attending safeguarding planning meetings and case conferences relating to people who may lack capacity, and where appropriate taking steps to safeguard the person's income and assets.</p> <p>The postholder will support the Client Financial Affairs Team to ensure that the Deputyship function is undertaken in accordance with the Mental Capacity Act 2005 and Orders of the Court and the appointeeship function complies with the duties set out by the Department of Work and Pensions.</p>
Work Context	<p>The Client Financial Affairs Team is a frontline team within Adult Social Care responsible for ensuring appropriate arrangements are put in place when a person has been assessed as lacking capacity to manage their financial affairs and no other suitable person is willing or able to make those arrangements. Where it is determined that Surrey County Council's Adult Social Care Directorate will be the appropriate financial advocate, the team will make the necessary arrangements to manage the person's financial affairs in consultation with the relevant social care team/practitioner. The team work closely with colleagues in the front-line teams in the Learning Disabilities and Autism service, Mental Health service, Transitions and Locality teams who support individuals on a day to day basis, including individuals with challenging behaviours around financial matters.</p>
Line management responsibility if applicable	<p>No line management responsibilities but may be required to supervise roles within the team and provide support to new team members on an occasional basis.</p>
Budget responsibility if applicable	<p>The Client Financial Affairs Team directly manages the finances of around 800 people and circa £10m in bank balances and annual income and expenditure of £6m.</p> <p>The post-holder will manage the finances of a deputyship and appointeeship caseload under supervision of the Assistant Team Managers /Team Manager. The value of the finances managed could be significant.</p>

<p>Representative Accountabilities Typical accountabilities in roles at this level in this job family</p>	<p>Planning & Organising</p> <ul style="list-style-type: none"> • Plan and prioritise own work activities for the weeks ahead, to ensure operational efficiency. Respond effectively to changing demands, adjusting priorities as needed. <p>Policy and Compliance</p> <ul style="list-style-type: none"> • Assist with work in a relevant technical or regulatory area in order that statutory and policy compliance is maintained. <p>People & partnerships</p> <ul style="list-style-type: none"> • Respond to and resolve enquiries and problems, judging when to pass on complex queries or involve others, to provide an effective service and clear advice to colleagues and customers. • Guide and/or supervise junior staff in their duties to facilitate their development and ensure service quality standards are maintained. • Communicate and liaise with service users and/or external contacts, representing the team/service as required. <p>Resources</p> <ul style="list-style-type: none"> • May assist in the management of a small budget or recovery of income. <p>Analysis, Reporting & Documentation</p> <ul style="list-style-type: none"> • Collate data, prepare reports/statistics to meet statutory/management information requirements. • Recommend improvements and support implementation to systems, processes and procedures, ensuring best practice is shared across the team. • Support, coordinate and undertake research into a variety of projects in the defined area of activity to support achievement of team's objectives. <p>Duties for all</p> <p>Values: To uphold the values and behaviours of the organisation.</p> <p>Equality & Diversity: To work inclusively, with a diverse range of stakeholders and promote equality of opportunity.</p> <p>Health, Safety & Welfare: To work alongside colleagues in the maintenance of a safe working environment reporting incidents, accidents, repairs and maintenance promptly and taking appropriate action as required. Adherence to safe working under the health and safety policy is required.</p> <p>To have regard to and comply with safeguarding policy and procedure as appropriate.</p>
<p>Education, Knowledge, Skills & Abilities, Experience and Personal Characteristics</p>	<ul style="list-style-type: none"> • Educated to A level, HNC or equivalent, or able to evidence ability at an equivalent level. • Knowledge of relevant technical area including, where appropriate, relevant practical skills. • For some roles a relevant degree may be required. • Good written and oral communication skills with the ability to build sound relationships with customers. • Competent in a range of IT tools. • Ability to apply specialist skills/judgement to undertake a programme of works. • High level analytical and organisational skills. • Able to prioritise and plan own workload in the context of conflicting priorities and work on own initiative. • A methodical approach to tasks, recording and reporting. • Typically previous work experience in a relevant environment. • Experience of staff supervision where appropriate.

Details of the specific qualifications and/or experience if required for the role in line with the above description	<ul style="list-style-type: none"> •An understanding of the Mental Capacity Act 2005 and related codes of practice and directions, and the workings of the Court of Protection and Office of the Public Guardian. •A good knowledge of the social security benefits system. •Able to work on own initiative, both independently and as part of a team, under pressure and with effective time management to prioritise and manage own workload. •Experience of financial and numerical work in a related or similar field. •Working within legal frameworks. •Experience in working effectively with other agencies and professionals. •Ability to work and travel within the county boundary. •Essential car user. •Positive DBS check must be maintained.
Role Summary	<p>Roles at this level typically provide specialist support services. Many will possess technical rather than professional expertise in the main disciplines. There will be minimal day-to-day supervision, but clear guidance will be available. The roles will plan for the weeks ahead and prioritise to accommodate non standard work. They often require understanding of complex procedures and support systems, and the ability to allocate workload and react to changing priorities. Although most work will follow established patterns, initiative is needed to handle processes and resolve problems and queries based on experience and judgement, mainly without reference to others. These roles may work alone instead of as part of a team, or the system or process used may require more specialist knowledge or experience. They may be involved in guiding/supervising the work of more junior staff.</p>

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