

# Role Profile

## Part A - Grade & Structure Information

Job Family Code	12BF	Role Title	Lead Manager - Client Financial Affairs
Grade	PS12	Reports to (role title)	Head of Financial Assessment and Client Affairs
		Directorate/School	AWHP
JE Band	519-613	Service/Department	Transformation, Assurance & Integration
		Date Role Profile was created	Jun-25

## 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.

<b>Role Purpose</b> including key outputs	<p>Working alongside the Head of Financial Assessment and Client Affairs, this role ensures deputyship activities meet legal and regulatory requirements, including the Mental Capacity Act 2005, Court of Protection orders, and OPG guidance. Responsibilities include overseeing applications, maintaining auditable records, managing financial risk and safeguarding concerns, and ensuring decisions reflect the wishes and values of individuals under deputyship.</p> <p>The role also involves supervising and supporting the team, promoting accountability and continuous improvement, liaising with internal and external partners, and representing the service in court or at panels when needed. Monitoring performance, producing reports, and driving service improvements are key elements of the post.</p>
<b>Work Context</b>	Client Financial Affairs plays a crucial role in safeguarding and supporting adults who lack the mental capacity to manage their own financial or property affairs. The post holder needs to work across adult social care department's collaboratively to ensure the best outcomes for those that need our care and support. The post holder will seek to ensure continuous improvement in service delivery taking advantage of digital solutions to deliver improved performance and outcomes.
<b>Line management responsibility</b> if applicable	Team of c20FTE 6 direct reports
<b>Budget responsibility</b> if applicable	£1million

<p><b>Representative Accountabilities</b> Typical accountabilities in roles at this level in this job family</p>	<p>Analysis, Reporting &amp; Documentation</p> <ul style="list-style-type: none"> <li>• Identify issues, trends and opportunities that may have an impact in their area of responsibility to enable appropriate action to be taken.</li> <li>• Lead the development of policy in the own area of specialism, contributing to the delivery of organisational objectives.</li> </ul> <p>Service Delivery</p> <ul style="list-style-type: none"> <li>• Evaluate existing service provision taking account of feedback and broader external developments, to ensure innovative solutions are proposed to maximise service quality, efficiency and continuity.</li> <li>• Apply specialist expertise and use judgement to make decisions where solutions are not obvious, to deliver services that meet customer requirements and service standards.</li> <li>• Drive change and embed new ways of working to ensure high quality service delivery and value for money.</li> </ul> <p>Planning &amp; Organising</p> <ul style="list-style-type: none"> <li>• Develop and ensure implementation of operational plans and play a key role in the formulation of strategic longer term plans for the area to fit broader functional and organisational strategy.</li> <li>• Lead major projects and reviews and represent the business area in internal and/or external initiatives to enhance reputation and service delivery.</li> </ul> <p>Finance/Resource Management</p> <ul style="list-style-type: none"> <li>• Manage allocated budget/resources/funding effectively and flexibly and control all related expenditure to ensure delivery of targets/objectives within budget.</li> <li>• Contribute to resource and budget planning within own area.</li> </ul> <p>Work with others</p> <ul style="list-style-type: none"> <li>• Liaise internally and externally at senior levels to establish service requirements and priorities and ensure the department/service issues are appropriately represented and acted upon.</li> <li>• Work with managers, service representatives and partners to identify and apply cost effective means of delivering improvements to business processes and strategies.</li> </ul> <p>People Management</p> <ul style="list-style-type: none"> <li>• Manage a group of staff across a function/service, or as a significant part of a wide function to ensure all relevant annual targets and goals are delivered within budgetary/resource constraints.</li> <li>• Lead, motivate and develop individuals using a coaching approach, to better meet current and future requirements.</li> </ul> <p>Duties for all</p> <p>Values: To uphold the values and behaviours of the organisation.</p> <p>Equality &amp; Diversity: To work inclusively, with a diverse range of stakeholders and promote equality of opportunity.</p> <p>Health, Safety &amp; Welfare: To be responsible for ensuring health &amp; safety policies, procedures and legislation are implemented, communicated and managed including making sure that health and safety responsibilities are fully understood and carried out by employees within their service area.</p> <p>To have regard to and comply with safeguarding policy and procedure as appropriate.</p>
<p><b>Education, Knowledge, Skills &amp; Abilities, Experience and Personal Characteristics</b></p>	<ul style="list-style-type: none"> <li>• Degree or equivalent professional qualification plus experience at management level in a specialist area.</li> <li>• Knowledge of the principles of change management, project management and continuous improvement, and their practical application.</li> <li>• Authoritative knowledge of the work practices, process and procedures relevant to the role including broader sector/commercial awareness.</li> <li>• Ability to manage budgets and resources to deliver effective support to their area of responsibility.</li> <li>• Strong written and oral communication and interpersonal skills with high level negotiation and influencing skills and the ability to work collaboratively with internal and external partners/professionals.</li> <li>• Comprehensive knowledge of computerised business systems.</li> </ul>

<b>Details of the specific qualifications and/or experience if required for the role in line with the above description</b>	<p>Degree or equivalent level professional qualification plus experience at a management level in a specialist area in a complex business environment.</p> <ul style="list-style-type: none"> <li>• Authoritative understanding of the relevant legislation and practice standards, together with broader sector/commercial awareness.</li> <li>• Ability to exercise a significant degree of interpretive and constructive thinking and evaluative judgement appropriately.</li> <li>• Extensive knowledge of the concepts of change management, project management and continuous improvement, and their practical application.</li> <li>• Ability to balance policy development with effective operational management.</li> <li>• Ability to deploy advanced skills to inspire, motivate, coach and develop team members to high levels of performance.</li> <li>• Strong written and oral communication and interpersonal skills with high level negotiation and influencing skills, and the ability to work collaboratively with internal and external partners/professionals..</li> <li>• Proven ability to manage budgets and available resources to deliver effective support to their area of responsibility.</li> <li>• Proven ability to assess risks and benefits and respond appropriately</li> </ul>
<b>Role Summary</b>	<p>Roles at this level are substantial management roles, they are either managing a multi functional support service within one of the organisation's service areas, or coordinating a specific business development or advisory area. This may involve significant coordination of complex or diverse services, e.g. leading business support services to professional teams, or coordinating teams carrying out specialist advisory or administrative services. More specialised roles will require a full understanding of a professional or specialised field and will work with those both inside and outside the organisation, to influence the development of services or delivery of specific projects or organisational objectives. They will provide overall guidance to more junior managers in terms of planning, service standards and resources which underpin service level agreements. Planning takes place over a one year horizon. They work closely with customers, staff, agencies and/or contractors to ensure that the services meet and exceed expectations. Roles at this level require extensive management experience and high level expertise. They exercise flexibility and independence for decision making within their particular functional area, working to broad parameters and policy guidance. Roles at this level are accountable for the professionalism of service delivery under their remit.</p>