

Role profile

Job Title:	Financial Assessment Manager	Grade:	Link grade 12–14
Department:	Financial Assessments	Post no.:	To be confirmed
Directorate:	Resources	Location:	Percival House

Role reports to:	Operations Manager – Financial Assessments
Direct reports:	SC14: 3 x senior officer, up to 10 x HB *officers; SC13: up to 15 HB officers; SC12: up to 15 HB officers *Officers – HB/LWA/Financial assessments (ASC) officer
Indirect reports:	N/A

Job description

Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.

Purpose of role

- To lead a Financial Assessment team of specialist staff dealing with all aspects of financial assessments, including the administration of housing benefits, council tax discount and any other assessment functions identified across the council.
- To ensure accurate assessments are carried out with due regard to subsidy, legislative and financial requirements.
- To assist in the compilation of statistics and government returns and liaise with any interested parties such as Finance, MHCLG, GLA and DWP.
- To record management information and report on activity and performance of the team.

- To lead and deliver innovation and projects in partnership with ICT and internal and external stakeholders delivering continuous improvement.
- Provide expert guidance on Financial Assessment matters, with a comprehensive understanding of relevant legislation.
- To support the Head of Service in securing the continuous development, improvement, efficiency and success of the Service and the Council through effective planning, budget management, staff management and governance.
- Working with other Service Managers, share responsibility for the development of initiatives and mitigation of impact of welfare reform to ensure responses are integrated with Benefits and Customer Services administration. To provide ongoing monitoring and analysis of Welfare reform impacts and mitigation.
- To deputise for the Head of Service in their absence or non-availability regarding Financial Assessment matters.

Key accountabilities

At grade 12

1. Demonstrate and maintain a comprehensive understanding of either housing benefit, local welfare, council tax or adults financial assessment and mobility legislation and a thorough understanding of relevant office computer systems and security measures, office policies and procedures.
2. To manage a team highly skilled of specialist officers dealing with a variety of tasks. Lead and motivate the team through change and challenge delivering a high-level service in line with corporate requirements.
3. Monitor and analyse complaints on a regular basis, draw conclusions and implement remedial action to improve customer satisfaction with the service.
4. Work collegiately and flexibly with colleagues across the management team to achieve the objectives of the Council. In particular, work closely with Service Managers to deliver a seamless and cohesive service regardless of access channel, and to provide management cover on a planned and ad hoc basis as required.
5. To carry out duties with due regard to the council's customer care, equal opportunities, information governance, data protection and health and safety policies and procedures.
6. To manage age the team, individuals and resources in according to the council's policies, procedures and set budgets.

7. To ensure that all health and safety processes are invoked and that staff are equipped to manage risk assessments and other health and safety issues.
8. To set and monitor achievement of team and section performance targets & objectives and ensure timely collation of management information to support service improvement.
9. Analyse and make use of management information provided to ensure integrity of records and individual performance, implement change to make correction where required or introduce new process to replace outdated or inefficient process.
10. Ensure that all the team's documentation, policies and procedures are reviewed and updated accordingly.
11. Ensure staff keep up to date with relevant legislation, standards, service policies, procedures, developments and initiatives in order to accurately carry out duties and are provided with training when required.
12. To create and prepare annual timetables (in liaison with other managers) including rolling reviews, reminders, and ensure these timetables are adhered to.
13. To support the analysis and implementation of changes resulting from relevant legislation or court cases, ensuring staff are properly advised and trained of procedural changes required.
14. Ensure that all invoices, credits, refunds, overpayments and write-offs are processed and reconciled in a timely manner, identifying and referring appropriate cases for authorisation by the designated officers.
15. To manage complex Financial Assessment enquiries from customers, MPs, agents and the Ombudsman. To carry out investigations to resolve and reconcile accounts, for example accounts with multiple transactional changes.

At grade 13

16. To implement more effective Financial Assessment policies, process and strategies, ensuring that all assessments are carried out according to agreed performance targets, whilst allowing alternative approaches for vulnerable customers and other exceptional cases.
17. To chair liaison meetings with internal and external stakeholders.
18. Ability to interpret complex Government legislation and ensure all policies and procedures meet with legal guidelines.
19. To work with other service managers to ensure service risks are identified and mitigated on an individual and team level.

20. To produce succinct and structured written communication, conveying clear messages concerning complex matters to these and a range of other audiences.

At grade 14

21. Working with other Service Managers, share responsibility for the development of initiatives and mitigation of impact of welfare reform to ensure responses are integrated with Benefits and Customer Services administration. To provide ongoing monitoring and analysis of welfare reform impacts and mitigation.
22. Effectively liaise and build good working relationships with all external organisations, Government departments and statutory agencies, such as Tribunals, DHCLG, voluntary agencies, DWP to maximise the availability of information useful to ensure the accuracy of financial assessments and maximising HB subsidy, protecting the council funds.
23. Support or lead, as required, the project management of corporate initiatives that impact on the Financial Assessments teams, including playing a lead role on IT/Finance projects, such as implementation digital, new computer systems and technology improvements
24. To represent Benefits Service and the council at meetings, high level steering groups, Court, Tribunals and to stakeholders, customers and senior representatives of other organisations.
25. Effectively liaise and build good working relationships across the council, promoting collaborative working and sharing of information. Provide appropriate and timely guidance to all levels of council staff in relation to all aspects of relevant areas covered.
26. To deputise for the Head of Service as required.

Key performance indicators

- Effective performance management of staff, including sickness absence.
- Delivery of agreed service performance targets.
- Minimising local authority error through effective performance management.
- Effective management of budgets.
- Completion of government, GLA and statutory returns.

- Contribution of information and evidence required by services or Finance colleagues for accounting and reconciliation purposes. (Excel spreadsheets, Business Objects reports)
- Timely resolution of customer enquiries and complaints.

Key relationships (internal and external)

- Other senior staff within financial assessments, LT and AR, Finance and other departments, GDPR team, ICT, Front Office, Benefit Service, Housing departments, Scanning team, Printing company.
- Customers, agents, landlords, housing associations, solicitors, VOA, DWP and DLUHC.

Authority level

- Service manager.
- Preparation and submission of court papers and files.
- Checking and authorising invoices, refunds and write-offs.
- Policy and procedure.

Person specification

Community and partnership working are essential for all roles as are a commitment to Equality, Diversity and Inclusion and ensuring Health and Safety at Work for everyone working at Ealing Council.

Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.

Essential knowledge, skills and abilities

Scale 12

1. Experience of managing staff in a Financial Assessment environment
2. An expert understanding of relevant legislation and case law
3. An expert understanding of one of the following areas, housing benefits, local welfare and council tax discount administration.
4. An expert understanding of related specialist benefit related software and financial office software such as spreadsheets, word processing, presentations.
5. Ability to monitor team performance and to instigate corrective actions where necessary.
6. Ability to monitor and manage budgets.

Scale 13

7. Ability to review policies and processes to ensure efficient and effective delivery of service.
8. Ability to monitor contractor performance and to instigate corrective actions.
9. Ability to identify risk and identify any mitigation required.

Scale 14

10. Demonstrable ability to represent the Council at court and tribunals.
11. Ability to deal with and liaise with customers and their agents, and a range of senior officers, external organisations and elected members, to ensure the Council's interests are protected and supported.
12. Ability to lead on key projects.
13. Ability to analyse and interpret data to inform and improve service delivery.
14. Ability to communicate complex matters in various forms in clear and concise manner.

Essential qualification(s) and experience

1. To have an appropriate work-based experience.

2. Experience of managing a Financial Assessment / Welfare Benefits team within a comparable organisation.

Values and behaviours

Improved life for residents	Trustworthy	Collaborative	Innovative	Accountable
• Is passionate about making Ealing a better place • Can see and appreciate things from a resident point of view • Understands what people want and need • Encourages change to tackle underlying causes or issues	• Does what they say they will do on time • Is open and honest • Treats all people fairly	• Ambitious and confident in leading partnerships • Offers to share knowledge and ideas • Challenges constructively and respectfully listens to feedback • Overcomes barriers to develop our outcomes for residents	• Tries out ways to do things better, faster and for less cost • Brings in ideas from outside to improve performance • Takes calculated risks to improve outcomes • Learns from mistakes and failures	• Encourages all stakeholders to participate in decision making • Makes things happen • Acts on feedback to improve performance • Works to high standards

