

Job Description

Job Title	Charging and Financial Inclusion Manager
Directorate	Finance and Resources
Service Area	Transactional Services
Grade	10
Competency Level	4
Salary	£54,916 – £60,640
Job Type	Hybrid
Location	Cunard Building
Disclosure and Barring Service (DBS)	Standard
Job Evaluation Ref No.	A9592

Job Purpose

Provision of a high-quality financial assessment, benefits advice and advocacy service including the administration of provider payments and debt recovery functions.

Directly Responsible For:

Modernisation & Development Lead x 1

SDSU Manager x 1



Senior Social Care Charging Manager x 1

Senior Financial Inclusion Officer x 2

Directly Responsible To:

Strategic Head of Transactional Services

Main Areas of Responsibility:

- Ensure that financial assessments for customers receiving chargeable care services (including residential, non- residential and personal budgets) are conducted in accordance with relevant national requirements (for example CRAG and the Social care Act 2014) and local policies (for example Fairer Contributions and Deferred Payments policies)
- Ensure the accuracy of financial assessments and that they are carried out quickly to maximise income to the authority and support high quality information to customers and their personal representatives
- Ensure that income from social care charges is maximised through timely billing to customers and implementing the Council's policy on the recovery of social care debt
- To ensure that financial assessments including direct payments and personal budgets are reviewed according to an annual programme of work including both case level reviews and national changes. To oversee the administration of deferred payments
- To report upon expenditure and income on social care charges
- Reporting to the Strategic Head of Transactional Services take lead responsibility for ensuring that Transactional Services successfully maximises rightful entitlement amongst customers. Devise and coordinate the Service's approach to customer access and take up working with the Assistant Director
- Be responsible for strategic and operational management of Transactional Services Take Up strategy and plan. This will include designing and delivering



innovative, intelligence led campaigns. Lead on identifying, organising and evaluating effective take up campaigns, including targeting “difficult to reach customers”, and developing innovative cost-effective approaches to income maximisation

- Coordinate analysis of the customer base to determine how customers’ needs are best met
- Coordinate delivery of take up activities on behalf of the Service including all areas of the service including benefit assessment, social care charges and the Liverpool Citizens Support Scheme
- Deputise for the Strategic Head of Transactional Services when required. This includes supporting operational and strategic management in all areas of the service
- Lead joint working initiatives with partner services and external agencies to improve services to the customer. Identify external opportunities to extend the reach of the service and develop delivery proposals
- Actively participate in Transactional Services Senior Management Team undertaking duties associated with it
- Ensure that staff performance is maximised and meets agreed service delivery levels
- To undertake other duties and responsibilities commensurate with the grade of the post and work within the council’s commitment to equal opportunities and customer service
- Monitor and report on service performance and identify appropriate actions to sustain and improve performance
- Support the development of a comprehensive, quality service by playing an active role in securing continuous improvement and best value
- Maintain up to date in depth knowledge of current and forthcoming social care financial assessment and benefit legislation and ensure that relevant information is shared with appropriate colleagues and customers. Provide strategic and operational advice and guidance regarding social care charges,

personal budgets, care accounts, benefits take up, advice and benefit maximisation

- Develop, maintain and manage the user configuration of the financial inclusion officer casework software application, acting as system owner
- Develop, maintain and manage the user configuration of the social care charges system in conjunction with finance colleagues
- Carry out recruitment and selection
- Participate in all aspects of training and development as directed and to use all relevant learning opportunities to improve personal skills so as to improve effectiveness and efficiency of service delivery
- Comply with the Council's requirements in relation to equal opportunities and to ensure the implementation and development (where appropriate) of non-discriminatory practices in all aspects of work and service provision
- Ensure that all work functions and where appropriate, line management responsibilities, are undertaken in accordance with all related Health and Safety legislation and relevant codes of practice
- Responsible for ensuring that all duties and responsibilities comply with all statutory requirements and with Standing Orders and Financial Regulations
- Ensure that appropriate arrangements are in place to provide for a positive work/life balance both in terms of personal workload and that of direct reports
- Develop the City Council's commitment to equal opportunities and to promote non-discriminatory practices in all aspects of work undertaken

Supervision and Management Responsibility:

- Ensuring activities are planned to include meaningful one to one conversations, quality annual appraisals, and regular workforce planning and development
- Manages performance and behavioural issues effectively

Budget and Financial Responsibility:

- Being fully accountable for managing the council's resources well and complying with statutory requirements. This includes managing time, avoiding unnecessary waste, reuse and recycle resources to reduce personal impact
- Monitor financial performance and deliver within budget
- Monitor financial performance, deliver within budget and seek savings and efficiencies by exploring opportunities to draw funding where appropriate

Social Value Responsibility:

- Drive for social value through all activities, ensuring wider social, economic and environmental benefits for the council, residents and communities

Physical Demands of the Job:

- This post will involve sitting at a desk and using a computer screen for prolonged periods of time

Corporate Responsibility:

- Contribute to the delivery of the Council Plan
- Delivering and promoting excellent customer service, externally and internally
- Commitment to customer excellence by dealing with customer feedback, including complaints, and learning from feedback in the drive for continuous improvement
- Making the council a great place to work, living the council's values, actively engaging in regular communications including team meetings, undertaking training as required and being responsible for managing own performance

- Develop the City Council's commitment to equal opportunities and to promote non-discriminatory practices in all aspects of work undertaken
- To ensure that all work functions are undertaken in accordance with health and safety legislation, codes of practice and the City Council's safety plan

Competency Framework:

We operate a competency framework, a set of core behaviours which define how we are expected to approach our work, how we perform in certain situations and how we treat each other. Each competency details the standards of behaviours and skills required by all staff and this in turn supports delivery of our aim and our council plans linking them together with our values.

The post holder will be required to demonstrate the ability to perform at the following competency level: **Level 4**.

[The competency framework can be found here.](#)

This job description is not intended to be either prescriptive or exhaustive. It is issued as a framework to outline the main areas of responsibility. You will be expected to carry out any other duties that may reasonably be required in line with your main duties and changing priorities of the organisation.

Person Specification

Assessment methods used: I = Interview, P = Presentation, A = Application, E = Exercise, T = Test, AC = Assessment Centre

Qualification and training

Essential

- Educated to Degree level or equivalent qualification service experience (A)

Desirable

- Management skills qualification or training

Experience

Essential

- Strong understanding of adult social care legislation, including the Care Act 2014, and other relevant frameworks (A)
- Experience of administering social care financial assessments/administration of social care charges in a similar sized organisation (A/I)
- Experience of leading, coaching and motivating a large team of staff (A/I)
- Experience of performance management (I)
- Experience of devising and implementing quality assurance programmes and processes for casework and/or assessment (A/I)
- Experience of managing complex programmes/projects including relationships with multiple stakeholders (I)
- Experience of developing innovative strategies in response to changing legislation (I)



- Experience of managing business change and modernisation including deployment of software, process, staff skills and benefits realisation (A/I)
- Experience of data analysis and producing statistical reports/presentations for a diverse audience (A/I)
- Experience of sound service delivery, customer satisfaction and strong financial outcomes (A/I)

Desirable

- Understanding of wider context of Transactional Services
- Experience of managing transactional and financial processing systems
- Experience of using Controc and Liquid Logic systems

Skills/Abilities

Essential

- Excellent communication skills (A)
- Ability to implement and manage change (A/I)
- Ability to produce and present clear procedural guidelines (I)
- Proven leadership skills (A)
- Good problem solving and creative thinking skills (A)

Commitment

Essential

- Practising and promoting equality of opportunity and non-discriminatory practice (A)
- Providing a quality service to meet customer needs (A)

Desirable

- An understanding of and a personal commitment to the Vision and Values of Liverpool City Council

Other

Essential

- This post is subject to a satisfactory Disclosure and Barring Service (DBS) check

Desirable

- Full driving licence