**Job Description**

This form is used to provide a complete description of the specific job and defines the required skills, knowledge, behaviours, qualifications and experience.

# Section A: Job Profile

The job profile provides key information relating to the salary and working conditions e.g. location of a job, along with the current focus of the role and a brief description of the main duties.

## Job Details

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| Job Title: | Money Management Officer |
| Salary: | £ 33366 to £ 36124 |
| Grade: | Grade 9 |
| Hours: | 37 |
| Team: | Money Management Service |
| Service Area: | Adult Social Care |
| Primary Location: | Working from home or from OCC office local to home. |
| Budget responsibility: | N/A |
| Responsible to: | Team Manager - Money Management |
| Responsible for: |  |

## Job Purpose

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| This is a brief overview of the key objectives of the job including the context within the team/department.  The case management of clients whose financial affairs, due to their mental incapacity, are supported by the Money Management Service. Providing advice and support to safeguard against the possibility of financial abuse.  To ensure the management of clients' financial affairs are in line with the Mental Capacity Act 2005 and Office of the Public Guardian/Court of Protection guidance, liaising closely with the social work teams and other interested parties when a complex or contentious financial decision needs to be made on the client's behalf. This requires knowledge in a specialist area which will be obtained via extended experience and formal off the job training.  This post holder is responsible for ensuring that all Adult Safeguarding policies and procedures are adhered to and concerns are raised in accordance with these policies. |

## Job Responsibilities

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| This is a list of the main duties or tasks that the post holder will be expected to undertake.  (1) To be the allocated officer responsible for the management of a caseload of around 60 individuals who are supported by the Money Management Service. The individuals will have a wide range of differing needs and requirements and the officer must be able to adapt their communication method appropriately.  (2) To investigate, obtain and verify details of individuals' financial circumstances. This will involve meeting with individuals, social workers and relatives to discuss complex or contentious issues relevant to the case.  (3) To identify the type of assistance to be provided to individuals, i.e. Deputyship or Appointeeship.  (4) To agree a Money Management Plan with the individual's social worker and where appropriate, the individual.  (5) To set up arrangements to enable the Money Management Plan to become operative.  (6) To ensure that systems are in place to maintain regular payments of individual’s commitments.  (7) To assist with the reconciliation of individual’s accounts. There is a need for these to be fully accurate as they are subject to review by the Office of the Public Guardian.  (8) To complete financial circumstances forms and liaise with the Financial Assessments Team to ensure that the individual's contributions towards care costs have been accurately assessed.  (9) To assist in the collection of outstanding debts that individuals owe to Adult Social Care, balancing this duty with the immediate financial needs of each client.  (10) Where an individual has debts, to negotiate with creditors and debt collection agencies on the individual's behalf, to secure write-offs and arrange repayment plans if necessary. This may require the officer to utilise developed negotiating skills with a variety of different organisations.  (11) To monitor potential financial abuse and report this to social workers so that prompt action can be taken in line with the Council's safeguarding responsibilities.  (12) To review benefit eligibility and ensure completion and submission of necessary applications. This requires knowledge in a specialist area which can be obtained via extended experience and formal off the job training.  (13) To prepare and manage deputyship applications to the Court of Protection, from the initial application to the granting of a final court order. This requires knowledge in a specialist area which will be obtained via extended experience and formal off the job training.  (14) Where an individual is managed under an order from the Court of Protection, to complete annual reports to the Office of the Public Guardian detailing the client's income and expenditure for the year, and any significant decisions made relating to the individual's financial affairs.  (15) To assist the Office of the Public Guardian/Court of Protection with audits of the Money Management Service.  (16) To undertake annual reviews of each individual's Money Management Plan, to ensure that the individual's needs are being met. If the individual is resident in a care home, this will involve an assessment of their general wellbeing, and the officer must therefore be prepared to challenge practices and highlight safeguarding issues as necessary.  (17) Where an individual is in permanent residential care and owns a property:  - to carry out a property protection visit under the Care Act 2014, with a social worker or another team member;  - to arrange unoccupied property insurance and ensure the property is maintained and secure;  - to visit the property at regular intervals in line with the insurance policy;  - to liaise with estate agents, solicitors and the individual to oversee the sale or renovation and lease of the property where appropriate.  (18) To provide general advice and support to social workers, individuals and the general public on the types of services available for managing individual's financial affairs.  (19) To assist in arranging 'end of life' plans if appropriate, liaising with solicitors and funeral directors for wills to be made and funeral plans arranged, to ensure that the individual's wishes are known and carried out after their death. |

# Section B: Selection Criteria

This section provides a list of essential and desirable criteria that detail the skills, knowledge, behaviours, qualifications and experience that a candidate should have in order to perform the job. The selection criteria provide a list of essential (no more than 8-10) and desirable criteria (no more than 4). The criteria are aligned to our [corporate values](https://www.oxfordshire.gov.uk/council/about-your-council/working-oxfordshire-county-council/county-council-values).

Each of the criteria listed below will be measured through; the application form (A), a test / exercise (T), an interview (I), a presentation (P) or documentation (D).

You must provide a supporting statement as part of your application which includes examples and evidence of when you have demonstrated the criteria listed below. You will be expected to address each point separately and in the order listed. If you do not complete a full supporting statement in the requested format your application may be rejected.

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| Essential Criteria | Assessed By: |
| Qualifications - 5 GCSEs (or equivalent), including English and Mathematics | A,I,D |
| Experience - Experience working with individuals who are elderly, have mental health issues, or learning disabilities | A,I,D |
| Numeracy and Systems Use - Confident with numbers and able to use accounting and record-keeping systems accurately. | A,I,D |
| Analytical and Problem-Solving Skills - Able to analyse information, solve problems, and take appropriate action independently. | A,I,D |
| Communication Skills - Able to communicate effectively and sensitively, including handling contentious issues and negotiating with clients and support staff. | A,I,D |
| Organisational Skills - Able to manage workload, prioritise tasks, and meet tight deadlines with minimal supervision. | A,I,D |
| Teamwork and Flexibility - Able to work collaboratively as part of a team and adapt to changing demands. | A,I,D |
| Trust and Accountability - Demonstrates high levels of personal integrity and accountability. | A,I,D |
| Client-Focused Approach - Committed to meeting the needs of vulnerable adults and delivering person-centred support. | A,I,D |
| Resilience and Demand Management - Able to manage conflicting demands from service users and maintain professional boundaries. | A,I,D |
| Desirable Criteria | Assessed By: |
| Benefits Knowledge - Understanding of Department for Work and Pensions (DWP) benefits and claims processes. | A,I,D |
| Legislative Awareness - Knowledge of the Mental Capacity Act 2005. | A,I,D |
| Financial and Legal Frameworks - Familiarity with banking practices, the Court of Protection, the Office of the Public Guardian, and Adult Social Care procedures. | A,I,D |
| Local Insight - Knowledge of the local community and available support networks. | A,I,D |

# Section C: Pre-employment Checks

All appointments are subject to standard pre-employment screening. This will include identity, references, proof of right to work in the UK, medical clearance and verification of certificates. Further information can be found here [Pre-employment checks](https://www2.oxfordshire.gov.uk/cms/content/support-attending-interviews)

Additional pre employment checks specific to this role include:

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| --- | --- | --- | --- |
|  | Enhanced Disclosure and Barring Service check with Children’s and Adults Barred List |  | Enhanced Disclosure and Barring Service check without [an Adult/Children’s barred list check](https://intranet.oxfordshire.gov.uk/cms/content/safer-recruitment-and-disclosure-and-barring-service-checks#enhanced-dbs-check-without-an-adult-childrens-barred-list-check) |
|  | Enhanced Disclosure and Barring Service check with Children’s Barred List |  | Enhanced Disclosure and Barring Service check with Adults Barred List |
|  | Standard Disclosure and Barring Service check |  | Basic Disclosure |
|  | Disqualification for Caring for Children (Education) |  | Overseas Criminal Record Checks |
|  | Prohibition from Teaching |  | Professional Registration |
|  | Non police personnel vetting |  | Disqualification from Caring |
|  | Other (please specify): |  |  |

# Section D: Working Conditions

This is a guide to the working conditions and the potential hazards and risks that may be faced by the post-holder.

## Health and Safety at Work

You are responsible for your own health, safety and wellbeing, and undertaking health and safety duties and responsibilities for your role as specified within Oxfordshire County Councils Health and Safety Policy.

The potential significant hazard(s) and risk(s) for this job are identified below (those ticked).

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|  | Provision of personal care on a regular basis |  | Driving HGV or LGV for work |
|  | Regular manual handling (which includes assisting, manoeuvring, pushing and pulling) of people (including pupils) or objects |  | Any other frequent driving or prolonged driving at work activities (e.g. long journeys driving own private vehicle or a council vehicle for work purposes) |
|  | Working at height/ using ladders on a regular/ repetitive basis |  | Restricted postural change – prolonged sitting |
|  | Lone working on a regular basis |  | Restricted postural change – prolonged standing |
|  | Night work |  | Regular/repetitive bending/ squatting/ kneeling/crouching |
|  | Rotating shift work |  | Manual cleaning/ domestic duties |
|  | Working on/ or near a road |  | Regular work outdoors |
|  | Significant use of computers (display screen equipment) |  | Work with vulnerable children or vulnerable adults |
|  | Undertaking repetitive tasks |  | Working with challenging behaviours |
|  | Continual telephone use (call centres) |  | Regular work with skin irritants/ allergens |
|  | Work requiring hearing protection (exposure to noise above action levels) |  | Regular work with respiratory irritants/ allergens (exposure to dust, fumes, chemicals, fibres) |
|  | Work requiring respirators or masks |  | Work with vibrating tools/ machinery |
|  | Work involving food handling |  | Work with waste, refuse |
|  | Potential exposure to blood or bodily fluids |  | Face-to-face contact with members of the public |
|  | Other (please specify): |  |  |

**Agile Working**

All staff may be required to work from a different base or in a different location at some point in the future in line with any Council or school needs.  Such changes will be made after proper consultation and shall be deemed to be reasonable after taking into account any personal requirements.