Post Title: Deputyship Officer

Grade: F

# Job Purpose

To promote the Council’s vision, values, aims, objectives, and priorities actively and effectively, putting our citizens first through the delivery of best value services.

The post-holder is responsible for a range of duties relating to the management of Property and Financial Affairs under the authority of an Order from the Court of Protection. They will ensure the delivery of a client centred service to vulnerable adults who lack mental capacity to manage their own financial affairs and ensure that they are safeguarded from financial abuse and supported to achieve their outcomes and maximise their wellbeing.

# Individual Leadership Expectations

As an Officer of the Council, you will be expected to demonstrate our core behaviours,

linked to the following four themes:

* **Individual Leadership**: by putting our citizens and customers first, delivering against your objectives, helping to set direction, and putting forward ideas for improvements.
* **Equality Diversity & Inclusion**: by ensuring we consider the needs of all NCC citizens in our work, show respect for others, upholding and adhering to the Council’s Code of Conduct.
* **Change & Innovation**: by being creative, delivering change when needed, sharing problems, and helping to bring forward suggestions for improvements.
* **Collaboration**: by working well with others, identifying the needs of colleagues and others to deliver great services and by being a good communicator who works well with a range of audiences.

# Specific Duties

1. Actively promote and embed Equality, Diversity, and Inclusion through all actions and in accordance with the organisation’s EDI strategy and objectives.
2. Contribute to our corporate responsibility in relation to climate change by taking action and limiting the carbon impact of activities within your role and championing this work.
3. To undertake the Corporate Director’s delegated role of Deputy or Appointee as required and directed in connection with management of property and financial affairs for citizens who lack mental capacity to manage their own finances and/or are severely physically disabled.
4. To apply for the granting of Deputyship Orders or Direction Orders from the Court of Protection and ensure compliance with any formal Directions and Instructions made by the Court, and act in accordance with the requirements of the Mental Capacity Act.
5. To maintain up-to-date knowledge of relevant legislation, statutory guidance, Court of Protection Practice Directions, Office of the Public Guardian Standards and guidance, corporate and Deputyship Service policies and procedures.
6. To be responsible for an individual case load of Deputyship and Community Appointeeship cases, adhering to best practice in casework management, Deputyship policies and procedures and Local Authority Deputyship Standards and Guidance issued by the Office of the Public Guardian.
7. To apply for and collect all sources of Income available to the citizen, ensuring that benefit entitlements are maximised and relevant changes of circumstances are monitored and notified to the DWP and other third parties timely. For example changes in capital, entering or leaving a care/hospital setting and moving home. To challenge negative benefit decisions by way of Mandatory Reconsideration or Appeal where necessary.
8. To ensure that all bills and liabilities are paid accurately and on time: including but not limited to accommodation charges (i.e., mortgage or rent), care fees contributions, maintenance costs, utilities and outstanding bills and debts.
9. To create and maintain an up-to-date financial statement for each citizen supported and ensure that they receive an appropriate level of personal spending funds from their disposable income, that is affordable, and is provided via pre-loaded pre-payment card.
10. To manage and make decisions in relation to requests for funds, purchases, and services up to the value of the authority limit of the role, and to ensure that all decisions and financial transactions are recorded, unbatched in CASPAR and have a clear audit trail. To delegate or directly make purchases when necessary, making sure financial procedures are adhered to.
11. To reconcile citizens bank accounts weekly in line with Deputyship Service policies and procedures, ensuring that all income and financial transactions are correct and accounted for, and investigate and remedy any income or expenditure that is not as expected.
12. Develop and maintain positive relationships with citizens and their circle of care (care & support providers, family, or friends), and visit clients in their own home at a minimum of once per annum, ensuring their care and welfare is met in conjunction with other service providers and partners.
13. Undertake a comprehensive review each citizen’s case annually, proceeded by the completion and submittal of the statutory annual report to the Office of the Public Guardian, on time, with accuracy and completeness.
14. To ensure that a client’s property and/or assets are secure and insured and manage the clearance and sale of property and assets in line with the relevant Court of Protection Order and Deputyship Service procedures. Where citizens are tenants, to give notice and/or enter into contracts for tenancies to enable a citizen to move timely and ensure rent payments are prioritised.
15. To manage Financial Investments for citizens with significant assets; prepare new cases for referral for Independent Financial Advice; and support the annual review of investments.
16. To liaise, communicate and collaborate with internal and/or external social care, support and care partners / providers, in order to ensure the citizens best interests are achieved in the management of their financial affairs and property.
17. To prepare, raise and pay Invoices via the council’s accounting systems in respect of Deputyship Administration and other fees and charges to ensure income is claimed timely according to the Deputyship Service Charging Policy.
18. Proactively identify citizens who may need to be transferred to Appointeeship Only case as a least restrictive option, or who may need to be stepped down to independence.
19. To adhere to safeguarding policies and procedures using your professional judgement to make appropriate referrals in a timely manner.
20. To deal with correspondence, telephone calls and personal enquiries relating to the work of the team, and deliver the highest possible standards of care to citizens, internal and external partners

**Numbers and grades of any staff supervised by the post holder: None**

All staff are expected to abide by the obligations set out in the Information Security Policy, IT Acceptable Use Policy and Code of Conduct in order to uphold Nottingham City Council standards in relation to the creation, management, storage and transmission of information. Information must be treated in confidence and only be used for the purposes for which it has been gathered and should not be shared except where authorised to do so. It must not be used for personal gain or benefit, nor should it be passed on to third parties who might use it in such a way All staff are expected to uphold the City Council obligations in relation to current legislation including the Data Protection Act and Freedom of Information Act.

**This is not a complete statement of all duties and responsibilities of this post. The post holder may be required to carry out any other duties as directed by a supervising officer, the responsibility level of any other duties should not exceed those outlined above.**

**Produced by: Kate Dixon,**

**Deputyship Programme and Change Lead**

**Date: 9th February 2024**

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| **Job title:** |

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| AREA OF RESPONSIBILITY | **REQUIREMENT** | | MEASUREMENT | | | |
| A | | **AC** | D |
| **Individual Leadership** | Takes personal accountability for own development. | |  | | **🗸** |  |
| Drive and motivation, ability to deliver against challenging objectives. | | 🗸 | | **🗸** |  |
| **Change and Innovation** | Confidence and ability to put forward ideas for change. | |  | | **🗸** |  |
| Ability to be creative, to be able to identify problems and work to create solutions. | | 🗸 | | **🗸** |  |
| **Collaboration** | Evidence of working successfully in partnership across different sectors, building and maintaining good working relationships. | |  | | **🗸** |  |
| Evidence of actively working with others to improve collaboration internally and externally. | | 🗸 | | **🗸** |  |
| **Equality, Diversity, and Inclusion** | An understanding of why it’s important to consider equality, diversity, and inclusion in all that we do. | | 🗸 | | **🗸** |  |
| Demonstrating personal commitment to the equality, diversity and inclusion challenges faced by our workforce and Nottingham’s people. | |  | |  |  |
| **Technical Skills and Knowledge** | An in-depth understanding and technical knowledge of welfare benefits relevant to the citizens supported: such as those living with disability, old age and in a variety of care settings. | | 🗸 | | **🗸** |  |
| Knowledge of the Care Act, Mental Capacity Act, Court of Protection and the role of the Public Guardian, relevant to the duties of a Local Authority Deputy. | | 🗸 | | **🗸** |  |
| An understanding of Adult Safeguarding Policy and Procedure and services provided under the Care Act by Local Authorities. | | 🗸 | | **🗸** |  |
| The ability to work with complex information, construct reports and submit applications to the Court of Protection | | 🗸 | | **🗸** |  |
| The ability to compose formal letters or submissions and negotiate with third parties to achieve outcomes for citizens | | 🗸 | | **🗸** |  |
| A high level of numeracy to be able to perform accurate mathematical calculations | | 🗸 | | **🗸** |  |
| The ability to make decisions, solve problems, and have the initiative to work alone with minimum supervision | | 🗸 | | **🗸** |  |
| The ability to independently managing and prioritise a demanding and varied case load to meet objectives and tight deadlines | | 🗸 | | **🗸** |  |
| The ability to manage citizens finances on a professional basis, including budgeting, accounting for income and expenditure and possessing a high level of attention to detail and accuracy. | | 🗸 | | **🗸** |  |
| The ability to work with vulnerable adults and their circle of care: possessing strong communication skills with the ability to build appropriate professional relationships, act as their advocate and in their best interests. | | 🗸 | | **🗸** |  |
| Ability to listen, consult and communicate effectively at all levels, both verbally and in writing | | 🗸 | | **🗸** |  |
| The ability and skill to effectively use Excel, Access, Word, and bespoke case management systems. | | 🗸 | | **🗸** |  |
| The flexibility and commitment required to work in a team. | | 🗸 | |  |  |
| **Qualification requirement** | Previous experience of working within a financial environment and in particular in connection with individual casework | | 🗸 | | **🗸** | 🗸 |
| **A - Application** | **AC – Assessment Centre** | **D – Documentary** | |

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