

Financial Protection & Payments Officer Applicant Recruitment Pack



Welcome

Hi,

We would like to thank you for your interest in the Financial Protection & Payments Officer role within Sefton Council's Adult Social Care team. The team support vulnerable people who lack capacity to manage their own finances.

This is an exciting and rewarding opportunity for someone who thrives on being organised, is approachable and wants to be at the heart of a busy and varied working environment.

You will be highly organised, confident working with complex financial information, and able to communicate sensitively with a wide range of stakeholders. Above all, you will put people at the heart of what you do and contribute to improving outcomes for our communities.

In return, we offer the opportunity to make a real difference in a role that combines financial expertise with meaningful public service

The Job Description and Person Specification for this role are included within the job pack. If you have any questions about the vacancy, please refer to the job pack for the appropriate contact details.

Best of luck!

Gemma Henry
Senior Payments & Billing Officer



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About the Borough of Sefton

Sefton is a confident and well-connected Borough, stretching from Bootle in the south to the coastal resort of Southport in the north. Home to more than 275,000 residents, Sefton encompasses a range of vibrant towns and communities, including Bootle, Litherland, Seaforth, Crosby, Formby, Maghull and Southport.

It is a fantastic place to live and work. As the northern-most Borough within the Liverpool City Region, Sefton offers a unique blend of beautiful coastline, countryside, attractive villages, thriving industrial areas and the busy Port of Liverpool.

With 22 miles of stunning coastline, Sefton is a leading coastal destination with a growing visitor economy. It is home to the iconic Antony Gormley *Another Place* installation, expansive beaches and protected sand dunes that support several rare species.

While each town and village has its own distinctive character, it is the people of Sefton who make the Borough truly special, creating diverse, welcoming and energetic communities in which to live, work, invest and visit.

Alongside its miles of golden sands, Sefton offers those who work here access to a world-renowned racecourse, prestigious golf courses, and National Trust nature reserves, ideal places to unwind, explore and enjoy leisure time.

The Borough benefits from excellent transport links, providing easy access to major North West cities including Liverpool and Manchester, and placing the Lake District and North Wales within reach for weekend breaks.

Whether you prefer vibrant town centres, friendly commuter towns, picturesque villages or stunning rural and coastal locations, Sefton offers a place to suit everyone. With house prices and rents typically lower than in neighbouring Liverpool and Manchester, you can enjoy coastal living while still being close to the buzz of city life.



Our Vision and Values

At Sefton Council, our vision is to deliver high-quality services that make a real difference to the lives of our residents, visitors, and communities. Everything we do is guided by a strong set of values that shape how we work and interact:



- **We put people at the heart of what we do** – ensuring our services are responsive, inclusive, and focused on improving lives.
- **We listen, value, and respect each other's views** – fostering a culture of collaboration and mutual respect.
- **We develop a culture of challenge, ownership, innovation, and improvement** – encouraging creativity and continuous development.
- **We are ambassadors for Sefton** – promoting the Borough positively and proudly representing our communities.
- **We are responsive and efficient** – delivering services that are timely, effective, and customer-focused.
- **We are clear about what we can and cannot do** – being transparent and honest in all our communications and actions.

These values underpin our commitment to excellence, inclusivity, and innovation, ensuring that Sefton remains a great place to live, work, and visit.

Our Successes and Key Projects

Sefton Council is proud of its recent achievements and ongoing commitment to delivering high-quality services. Our Adult Social Care services were recently graded Good by the Care Quality Commission (CQC), and our Children's Services also



achieved a Good rating from Ofsted. These successes reflect the dedication and professionalism of our teams and our focus on continuous improvement.

Alongside these achievements, Sefton Council is actively delivering a range of major capital projects that will transform the Borough and stimulate economic growth. These include the Marine Lake Events Centre in Southport, the Strand Shopping Centre redevelopment in Bootle, and exciting developments such as the Cove Resort and Enterprise Arcade in Southport. We are also proud to support cultural and community initiatives like Salt and Tar, Bootle's vibrant events space, which hosts live music, comedy, and family-friendly activities, bringing people together and boosting the local economy.

These projects form part of our strategic investment programme to attract private sector-led development and create vibrant spaces for residents and visitors. We work closely with local communities to ensure these projects reflect their needs and foster a sense of ownership and pride.

For more information on these projects and to stay updated on progress, visit the Sefton Council website at www.sefton.gov.uk

An Inclusive Workplace

We are committed to fostering an inclusive Council that reflects the diverse communities we serve. Our workforce brings a wide range of experiences and perspectives, and we value an environment where everyone feels respected, supported, and able to reach their full potential.

Sefton is proud to be the first local authority in the Liverpool City Region to achieve **Navajo** accreditation, recognising our commitment to LGBTQ+ inclusion. We are also a Disability Confident employer and continue to build a workforce that represents our communities.

We support several staff networks, including groups for Black and Ethnically Diverse colleagues, LGBTQ+ staff, women, disabled employees, and a Christian Workplace Group.

As an Equal Opportunities Employer, we base recruitment solely on skills, experience, and suitability for the role. All applicants are treated fairly, and we have also recognised 'care experienced' as a protected characteristic within Sefton.



For more information, please refer to our [Equality, Diversity and Inclusion Strategy](#)

Liverpool City Region Fair Employment Charter



Sefton Council is proud to support the Liverpool City Region Combined Authority Fair Employment Charter, an initiative that promotes fair, healthy, inclusive, and just workplaces across the region. The Charter celebrates good employers and encourages the highest standards in employment practice, including fair pay, secure work, opportunities for progression,

strong employee voice, and a commitment to staff wellbeing. By aligning with the Charter, we demonstrate our dedication to providing a fair day's pay for a fair day's work and to fostering an equitable and supportive working environment for all colleagues.

What We Can Offer You

- A supportive and collaborative working environment.
- An agile approach to working.
- Opportunities for professional development and career progression.
- A role where your work makes a real difference across the organisation.
- Flexible working arrangements supporting work-life balance.
- A strong commitment to equality, diversity, and inclusion.

You will benefit from a comprehensive local government employment package which includes the following:



- Competitive salary in line with NJC Local Government Pay Scales.
- Membership of the Local Government Pension Scheme (LGPS), providing a secure, defined benefit pension with employer contributions.

Annual Leave and Work-Life Balance

- Generous annual leave entitlement, 28 days annual leave rising to 33 days with 5 years continuous service.
- Additional public (bank) holidays.
- Flexible working options to support a healthy work-life balance, subject to service needs.
- Option to purchase additional annual leave.

Learning, Development and Career Progression

- A comprehensive induction programme.
- Access to a wide range of training, apprenticeships, learning, and development opportunities.
- Support for professional development and role related qualifications.
- Opportunities to develop your career within a large and diverse local authority.

Health, Wellbeing and Support

- Enhanced sick pay scheme.
- Employee wellbeing initiatives and access to occupational health support.
- Policies that promote physical and mental wellbeing in the workplace.

Family-Friendly and Inclusive Policies

Our family-friendly policies and flexible working arrangements help staff maintain a healthy work-life balance.

- Family friendly policies, including enhanced maternity, paternity, adoption, neonatal care and special leave to support with time off work to deal with issues when life events happen.
- A strong organisational commitment to equality, diversity, and inclusion.
- Reasonable adjustments and support to enable disabled employees to thrive.



Foster Friendly Employer Commitment

Sefton Council is proud to be a *Foster Friendly* organisation as recognised by The Fostering Network. We actively support employees who are foster carers or who are applying to foster by offering flexible working arrangements, paid time off for fostering-related meetings and training, and a workplace culture that recognises the vital role foster carers play in our communities.

This commitment helps ensure carers can balance fostering responsibilities alongside career, and reflects our dedication to supporting children, families, and those who care for them.

Additional Benefits

- Access to salary sacrifice and employee benefit schemes (where applicable).
- Opportunities to contribute to meaningful work that supports local communities.
- A supportive, values led organisational culture.
- Free parking at office bases (dependent upon the work location).

About the Role

Your role will be to manage the social security (state) benefits of vulnerable adults who are unable to do so themselves, ensuring their money is used in their best interests. This includes making applications for corporate appointeeship in line with the council's policy, managing income and expenditure, and liaising with relevant agencies such as the Department for Work and Pensions (DWP) and social care agencies.

The key responsibilities include:

Supporting vulnerable adults who lack the mental capacity to manage their own finances by:

- Delivering a corporate appointeeship service, including ensuring individuals receive their full benefit entitlements and support them with other financial responsibilities.
- Preparing, submitting and monitoring court of protection applications.
- Processing financial transactions to ensure timely and accurate payments and charges.

Please see **Appendix A (page 10)** for a full copy of the Job Description and Person Specification.



Top Tips on How to Apply

Submitting a strong application gives you the best chance of progressing to the next stage of the recruitment process. The following guidance applies to all roles and will help you prepare a clear, compelling application:

1. Read the Job Description and Person Specification Thoroughly

- Make sure you understand the key duties, expectations, and essential criteria.
- Use the person specification as your guide when writing your application.

2. Provide Clear Evidence of Your Skills and Experience

- Show *how* you meet the criteria using specific, real examples.
- Consider using the **STAR method** (Situation, Task, Action, Result) to structure your responses.

3. Tailor Your Application

- Avoid generic statements. Focus on experience that directly relates to the role you are applying for.
- Demonstrate how your strengths align with the organisation's values and priorities.

4. Highlight Your Achievements

- Include examples of work you are proud of or significant contributions you have made in previous roles.
- Emphasise impact – improvements, efficiencies, positive outcomes, or innovations.

5. Be Clear About Qualifications and Training

- List all relevant qualifications and professional training, including dates and awarding bodies.
- If you are working towards a qualification, include expected completion dates.

6. Showcase Transferable Skills

- Skills such as communication, teamwork, problem-solving, digital literacy, and organisation are valuable across all roles.



- Provide examples that demonstrate these effectively.

7. Check Your Application Carefully

- Review your responses for clarity, spelling, and completeness.
- Ensure all sections of the application form have been filled in fully.

8. Submit Your Application Before the Deadline

- Note the closing date and allow plenty of time to prepare your application.
- Late submissions usually cannot be considered.

9. Prepare for Potential Next Steps

- If shortlisted, you may be invited to an interview, assessment task, or presentation.
- Be ready to discuss your experience, approach to work, and examples of how you meet the role's requirements.

Application and Selection Information

The closing date for this vacancy is **Sunday 5th April 2026** (or earlier in the event of high volume of applications being received).

Provisional interview date is **14th April 2026**

We are an Equal Opportunities Employer; all candidates will receive equal treatment. Our decision to appoint will be based upon whether an individual's skills, experience, qualifications, and abilities make them the most suitable candidate for the role.

All disabled and care experienced applicants will be offered an interview where they meet all essential criteria on the person specification.

Please ensure that you meet all the essential criteria outlined in the person specification before submitting your application. Only applicants who demonstrate that they meet all essential criteria will be considered and invited to interview.



Appendix A – Job Description and Person Specification

Department:	Adult Social Care
Division:	Client Support
Post:	Financial Protection & Payments Officer
Grade:	Grade G
Location:	Magdalen House
<u>Responsible to:</u>	Senior Payments & Billing Officer

JOB PURPOSE

The purpose of the role is to support vulnerable adults who lack the mental capacity to manage their own finances by:

- Delivering a corporate appointeeship service, including ensuring individuals receive their full benefit entitlements and support them with other financial responsibilities.
- Preparing, submitting and monitoring court of protection applications.
- Processing financial transactions to ensure timely and accurate payments and charges.

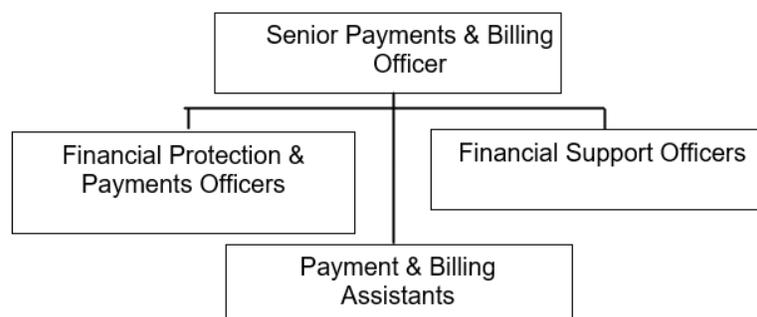
MAIN DUTIES

1. To ensure that all financial transactions are undertaken effectively and within agreed timescales. Validate Adult Social Care provider payments and client invoices, ensuring the accuracy of information and timeliness of transactions.
2. Be proactive in preventing and monitoring Adult Social Care debt. Calculate and raise invoices, liaise with individuals, their representatives, and council staff, to minimize debt by recovering income for the Council.
3. Complete financial assessments and reassessments to maximise benefits and ensure correct care charges.
4. Liaise with care providers, people who receive services, and their representatives, Council colleagues and external agencies (e.g. Department for Work and Pensions, Solicitors, the Office of Public Guardian) to provide guidance on appointeeships and Court of Protection in order to provide information, progress applications, resolve queries and highlight concerns.
5. Complete applications for corporate appointeeships, carry out duties in line with Adult Social Care's appointeeship policy, and set up prepaid cards for personal allowance payments.



6. Ensure that appointeeship accounts are reconciled, balances monitored and accounts closed. Support with payment of funeral costs, settle priority debts and release funds in line with Adult Social Care's appointeeship policy.
7. Support individuals and staff with Court of Protection applications in relation to financial affairs and monitor progress. Progress referrals to Solicitors as required.
8. Ensure that policies and procedures relating to financial regulation, provider payments, invoicing and debt recovery are applied.
9. To ensure that all financial records and systems are maintained and monitored. To prepare and present, as necessary, reports, statistical data and other such information as is required from time to time or in accordance with predetermined time scales.
10. Raise safeguarding concerns or highlight transactional discrepancies internally and with external agencies, escalating any risks or noncompliance issues to line manager.
11. Participate in reconfiguration workshops and User Acceptance Testing for product change or release management activities.
12. Put people at the heart of what we do and be responsive. Maintain a customer focus with a relentless pursuit of excellence, developing services that improve outcomes for the communities of Sefton.
13. Maintain and develop partnerships within and outside of the Authority. Work corporately as well as collaboratively with a wide range of departments, communities, partners and other agencies, building relationships that foster trust and have collective integrity and responsibility for service delivery and outcomes.

ORGANISATION CHART





SPECIAL CONDITIONS

The post is customer facing therefore you must have the ability to fulfil all spoken aspects of the role with confidence through the medium of English.

The post you are applying for is exempt from the Rehabilitation of Offenders Act 1974 and therefore you are required to declare any convictions, cautions, reprimands and final warnings that are not 'protected' (i.e., filtered out) as defined by the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (Amendment) (England and Wales) Order 2013.

For further information, please refer to DBS filtering guidance at www.gov.uk/dbs.

The post you are applying for requires access to the Public Service Network (PSN) and requires compliance with the HMG Baseline Personnel Security Standard.

This post is designated as a Casual Car User. Casual car user allowance will be paid as appropriate.

GENERAL

This job description is a representative document. Other reasonably similar duties may be allocated from time to time commensurate with the general character of the post and its grading.

All staff have a duty to take care of their own health & safety and that of others who may be affected by your actions at work. Staff must co-operate with employers and co-workers to help everyone meet their legal requirements.

The Authority has an approved equality policy in employment and copies are freely available to all employees. The post holder will be expected to comply, observe and promote the equality policies of the Council.

Note: Where the postholder is disabled, every reasonable effort will be made to support all necessary aids, adaptations or equipment to allow them to carry out all the duties of the job.

Since confidential information is involved with the duties of this post, the postholder will be required to exercise discretion at all times and to observe relevant codes of practice and legislation in relation to data protection and personal information.

Undertake, and participate in training, coaching and development activities, as appropriate.



The person appointed will be expected to work flexibly and the exact nature of the duties described above is subject to periodic review and is liable to change.

Prepared by:

<u>Name</u>	Karen Lee.
<u>Designation</u>	Service Manager
<u>Date</u>	20 November 2025



**METROPOLITAN BOROUGH OF SEFTON
PERSON SPECIFICATION**

Post: Financial Protection & Payments Officer **Post No.**
Department: Adult Social Care **Division:** Payments & Billing team

Personal attributes required (on the basis of job outlined)	Essential or Desirable	Method of Assessment Application (A) Interview (I)
<p>Relevant Education/Training</p> <ul style="list-style-type: none"> • Relevant Academic and/or Professional Qualification or equivalent experience/skills. 	E	A
<p>Experience</p> <ul style="list-style-type: none"> • Experience of using financial data systems. • Experience of compiling financial information for reports and statistics. • Delivering customer focused services. 	E E E	A/I A/I A/I
<p>Skills/Knowledge/Aptitudes</p> <ul style="list-style-type: none"> • Ability to prioritise and operate effectively with a high volume and at times, highly sensitive workload. • Proficient and demonstrable skills in literacy and numeracy • Ability to work to deadlines. • Ability to work in partnership at all levels, including negotiating, communicating and working collaboratively with internal/external organisations to achieve outcomes. • A confident communicator both written and verbal. • Ability to use own initiative and able to work with integrity and accountability. • A team worker who fosters partnerships, works collaboratively demonstrates and promotes openness, trust and respect. • Personal commitment to delivering services effectively and efficiently. • Quality orientated, innovative and commitment to continuous improvement. 	E E E E E E E E	A/I A/I A/I A/I A/I A/I A/I A/I

