

Financial Assessment Officer

Applicant Recruitment Pack

Sefton is a really great place to live and work



Welcome

Hi,

We would like to thank you for your interest in the Financial Assessment Officer role within Sefton Council's Client Support Team

This is an exciting time to join us as we continue to strengthen our services and deliver high-quality outcomes for our residents, communities, and partners.

The role is an important part of our team, completing financial assessments for individuals who are in receipt of a care and support services from Sefton Adult Social Care and providing welfare benefit advice to maximise income for the individual.

We're looking for someone who is highly organised, with strong literacy and numeracy skills, can manage their own workload, is approachable and an excellent communicator.

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.

If, when you've finishing reading this pack, you like what you see, and Sefton's Vision and Values align to yours then we can't wait to hear from you.

Best of luck!

Adele Samuel
Principal Manager – Client Support



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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

This is a full time permanent post available from 3 October 2026.

We are looking for a financial assessment officer to join our Client Support team within Adult Social Care to complete financial assessments for adults who have been assessed as requiring care and support either in their own home or in a residential or nursing home.

In addition to completing financial assessments, the role includes providing welfare benefit advice to maximise income for the individual and potential income recovery to the Council.

The successful applicant will ideally have experience of financial assessments and administration.

We are looking for applicants who have excellent numeracy and literacy skills. You must have experience of delivering a customer focused service and be able to communicate with vulnerable adults, as well as building partnerships with internal and external agencies. An ability to manage and prioritise your own workload is essential as is experience in using Microsoft Office products. We are looking for candidates who are self-motivated, can demonstrate a flexible attitude and an ability to work from their own initiative.



The team work from home and from the office. The office base is Magdalen House in Bootle and it is expected that the team are in the office on Wednesdays. There will be some visits to clients in their homes throughout the Sefton borough as required as well as occasional attendance at meetings in other council offices across the borough.

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 13 September 2026** (or earlier in the event of high volume of applications being received).

Provisional interview dates are **Tuesday 22 September 2026**. Interviews will be held in person

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

Post:	Financial Assessment Officer
Directorate:	Adult Social Care
Location:	Magdalen House, Bootle, L20 3NJ
Division:	Client Support
Term:	Permanent
Hours	36
Grade:	G £33,673 to £37,563
Reporting to:	Senior Financial Assessment Officer

Purpose of the Role

The role will primarily be one of undertaking Adult Social Care Financial Assessments (relative to residential and non-residential services), whilst providing Welfare Advice to maximise income for the client and potential income recovery to the Council.

MAIN DUTIES

1. Undertake financial assessments and re-assessments in a timely and accurate manner, as directed by the Senior Officer or Team Manager. Apply national guidance and local policy in assessment, to ascertain if a client can contribute to their care and support. Visit the homes of clients as necessary and have due regard to the individual client circumstances and the environment in which the assessment needs to be undertaken.
2. Use the Council's 'ContrOCC' system for recording information, calculating client contributions, generating notifications and for completing financial re-assessments.
3. Validate income, expenditure and capital (including property ownership) information provided by clients during the financial assessment, by checking bank statements, receipts, bonds, trust, Land Registry, DWP and Revenues and Benefit records.



4. Ensure that opportunity to maximize client income through welfare provision is exploited, providing welfare advice to clients and supporting client benefit applications. Refer complex welfare issues to the Welfare Rights Team as appropriate.
5. Inform clients and staff in the Payment & Billing Team of potential charges (or changes to existing charges) and respond to any queries relating to financial assessments.
6. Ensure that policies and procedures relating to financial regulation, and financial assessments are understood and applied consistently.
7. Apply the Council policy for Deferred Payment Agreements where a client's property is considered against the cost of service provided. Ensure that DPAs presented for approval are sustainable and mitigate the risk of income recovery.
8. Support the Council's debt recovery process by liaising with or revisiting clients who may fall into arrears, instigating a financial re-assessment and negotiating re-payments as appropriate.
9. Work effectively as part of a team, prioritise own workload, work to pre-determined deadlines and engage in multiple initiatives simultaneously, with a pursuit of excellence. Contribute as a member of a team. Visibly and positively respect, value, listen to and support others with a view to improving quality.
10. Put people at the heart of what you do and be responsive, ensure that you maintain a customer focus. Signpost clients to sources of information about Adult Social Care, including the Sefton Directory.
11. Develop partnerships within and outside of the Authority. Work corporately as well as collaboratively with a wide range of communities, partners and other agencies, building relationships that foster trust.



12. Contribute to the development and/or change of Council IT systems used for administration of Adult Social Care financial assessments. Participate in reconfiguration workshops and User Acceptance Testing for product change or release management activities, as requested.
13. Ensure that any visitors are met and attended to using the correct salutation, with due regard for the security of staff, the building and the equipment belonging to the service.
14. Respond to general correspondence, enquiries and complaints, both verbal and/or in writing, from a wide range of contacts, including clients, using the correct salutation. Ensure the provision of basic information, taking and recording of messages, generating and sending of standard information or redirection of more complex matters to appropriate officers, departments or agencies.
15. Undertake administrative tasks including data input, word processing, photocopying, filing, faxing, emailing, shredding and archiving documentation and records.

GENERAL REQUIREMENTS

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](https://www.gov.uk/dbs).

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



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

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

If the postholder has access to confidential information, 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.

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.



PERSON SPECIFICATION

Post: **Financial Assessment Officer.**

Department: **Adult Social Care**

Personal Attributes Required	Essential (E) or Desirable (D)	Method of Assessment
<u>Relevant Education / Training</u> Relevant Academic and/or Professional Qualification or equivalent experience/skills.	E	AF/C/I
<u>Experience</u> A proven track record or ability of: Financial assessment and administration. Providing administrative support. Delivering customer focussed services. Attending to visitors and responding to enquiries with the correct salutation. Working effectively in partnership with a wide range of communities, partners and other agencies. Working to pre-determined deadlines and prioritising work effectively. Using IT applications and maintaining information systems. Presenting information to inform decisions.	E E E E E E E E	AF/I AF/I AF/I AF/I AF/I AF/I AF/I



<u>Ability/Skills/Knowledge</u> Effective communication and interpersonal skills. Ability to work using own initiative and collaboratively with others to achieve outcomes. Ability to operate effectively with a high workload, delivering to expectation and deadlines. Ability to work in partnership at all levels, including negotiating, communicating and working collaboratively with internal/external organisations to achieve outcomes. Knowledge and understanding of financial assessments processes and national charging policies in an Adult Social Care setting.	E E E E E	AF/I AF/I AF/I AF/I AF/I
<u>Personal Style and Behaviour</u> Personal commitment to delivering services effectively and efficiently. Able to respond to constructive challenge and not be discouraged. Motivated and enthusiastic. A team worker who fosters partnerships, works collaboratively demonstrates and promotes openness, trust and respect. Quality orientated, innovative and commitment to continuous improvement. Act as a role model for others demonstrating a 'can do' attitude and promoting positive challenge. Respects confidentiality.	E E E E E E	AF AF AF AF AF AF/I



Other Requirements Evident commitment to personal continued Professional Development.	D	AF/C
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Prepared by: Karen Lee

Date: September 2015

Assessment Methods

AF: Application Form

I: Interview

C: Certificates

P: Presentation

