 **Job Description**

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| **Department** | **Chief Executive’s Department (Chief Executive’s and Place Finance)** |
| **Job Title** | Career Grade Financial Management Information Officer |
| **Grade** | F-G  Progression to Grade G is based on satisfactory assessment of relevant criteria) |
| **Primary Purpose of Job** | To assist in the preparation and management of the Department’s budget. |
| **Reporting To** | Group Accountant |
| **Direct Staffing Reports** | N/A |

**Main Duties – Grade F**

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| **1** | Assist in the accurate preparation and maintenance of Department’s budgets. | | |
| **2** | To undertake regular, timely and accurate monitoring of specific service areas of the Department’s Revenue Budget to enable the appropriate control and review of financial performance throughout the year. | | |
| **3** | To provide advice to, and liaise with, a range of budget holders across the Department to ensure that the best use is made of the Department’s financial resources. | | |
| **4** | To develop maintain and provide, in conjunction with Senior Managers in the service area, a range of financial information for budget holders including unit costs and budget monitoring information | | |
| **5** | To assist in the preparation of final accounts. | | |
| **6** | Preparation of the Revenue Budget for specified areas of the Departments. | | |
| **7** | Preparation of budget monitoring information for a specific area of the Department’s activity | | |
| **8** | To liaise and consult with a variety of budgets holders in order to agree budget allocations and monitoring information in relation to those allocations. | | |
| **9** | Assist in the development of relevant financial training offered by the section. | | |
| **10** | Delivery of formal and informal financial training. | | |
| **11** | The calculation of timely and accurate unit cost information. | | |
| **12** | To create and maintain effective communication with the budget unit through consultation, liaison and close working with other relevant staff from the department and with individuals from other departments or agencies. | | |
| **13** | To be familiar with the opportunities created by the use of information technology facilities and contribute to the further development of computer-based resource systems, within the context of the role, as outlined in the main areas of work. | | |
| **14** | Attendance at Management Teams, as and when required. | | |
| **15** | To assist in other areas of work within the Section, as requested by the Budget Section Manager. | | |
| **16** | To be familiar with the opportunities created by the use of information technology facilities and contribute to the further development of computer-based resource systems, within the context of the role, as outlined in the main areas of work. | | |
| **17** | To assist in other areas of work within the Section, as requested by the Management Team. | | |
| **Main Duties – Grade G**  **Progression to Grade G is dependent on assessment of ability to undertake the following duties**   |  |  | | --- | --- | | **1.** | Contribute to the accurate preparation and maintenance of the Department’s budget | | **2.** | To work with Budget managers on a one-to-one basis to ensure that projects are cost effective and provide value for money (Project Appraisal). | | **3.** | To develop, maintain and provide, in conjunction with Senior Managers in the service area, a range of financial information for budget holders including unit costs and budget monitoring information. | | **4.** | To identify key risk areas and work with service managers to mitigate the risk. | | **5.** | To provide advice to, and liaise with, a range of budget holders across the Department to ensure that the best use is made of the Department’s financial resources. | | **6.** | To assist in the arrangement and administration of a programme of financial training for all staff within the Department. | | **7.** | To provide financial support regarding departmental initiatives. | | **8.** | To provide training in a lead role to ensure all staff are adequately trained. | | **9.** | Responsibility for work on specific financial projects or developments in order to enable the Section to respond to the changes that affect the finance function. | | **10.** | To assist in the preparation of final accounts. | | **11.** | Preparation of the budget for the service area within the postholders responsibility. | | **12.** | To prepare budget monitoring information for any area of the Department’s activity. | | **13.** | To assist in the preparation of the monthly monitoring information relating to the budget changes agreed through the Corporate Business Planning Process. | | **14.** | To liaise and consult with a variety of budgets holders in order to agree budget allocations and monitoring information in relation to those allocations. | | **15.** | To create and maintain effective communication with the Budget Holders through consultation, liaison and close working with other relevant staff from the Department and with individuals from other Departments or Agencies. | | **16.** | To be familiar with the opportunities created by the use of information technology facilities and contribute to the further development of computer-based resource systems, within the context of the role, as outlined in the main areas of work. | | **17.** | To assist in other areas of work within the Joint Finance Section, as requested by the Finance Management Team. | |  |  | | | |
| **Date Job Description prepared/updated:** | | **May 2022** | |
| **Job Description prepared by:** | | **Group Accountant** | |

**Person Specification**

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| **Department** | | | **Chief executive’s And Place** | | | |
| **Job Title** | | | **Career grade financial management information officer** | | | |
| **Stage One** | | | Candidates who are care leavers, have a disability, are ex-armed forces or are a carer (see [Carers-Charter-FINAL.pdf (gmhsc.org.uk)](https://www.gmhsc.org.uk/wp-content/uploads/2018/04/Carers-Charter-FINAL.pdf) are guaranteed an interview if they meet the essential criteria for the role | | | |
| **The Minimum Essential Requirements for the above Post are as Follows:** | | | | | | **Method of Assessment** |
| **1.** | **Skills and Knowledge** | | | | | |
|  | **Grade F Skills and Knowledge** | | | | | |
| 1. | The ability to produce, evaluate and interpret financial management information on a regular basis for the benefit of Service Managers. | | | | | Test |
| 2. | The ability to communicate and present detailed financial information to finance and non-finance individuals/ groups at all levels of the organisation. | | | | | Application Form/Role Play/Interview |
| 3. | Must be able to work to deadlines and manage time effectively, whilst demonstrating both team working and working on own initiative. | | | | | Application Form/Interview |
| 4. | The ability to build up relationships with others both inside and outside the Joint Finance Section. | | | | | Interview |
| 5. | The ability to identify and resolve problems relating to financial management in a proactive way and demonstrate a challenging approach to problem solving. | | | | | Application Form / Interview |
|  | **Competencies** – Please note the council’s corporate competencies, which are considered to be essential for all roles, are in the attached CORE COMPETENCIES document | | | | | Interview |
| 2. | **Grade F Experience/Qualifications/Training etc** | | | | |  |
| 1. | Experienced qualified accounting technician, equivalent qualification or qualified by experience | | | | | Application Form/Certificate/Interview |
| 2. | Experience of creating and maintaining spreadsheets in order to analyse financial information, specifically Microsoft products. | | | | | Application Form / Interview / Exercise |
| 3. | Must have experience of working in a relevant financial setting. | | | | | Application Form/Interview |
| 4. | Experience of preparing Financial Management information. | | | | | Application Form / Interview |
| 3. | Work Related Circumstances | | | | |  |
| 1. | All posts require the job holder to undertake mandatory training for the role and to regularly review their development needs in conjunction with their line manager. Development of our employees plays a key role in delivering our services. | | | | | Interview |
| 2. | The Council has a framework of Values & Behaviours that guide our behaviour and decision making to help achieve our vision. All employees are expected to be mindful of these when undertaking their work. | | | | | Interview |
|  | **Grade G Skills and Knowledge** | | | | |  |
| 1. | The ability to produce, evaluate and interpret financial management information on a regular basis for the benefit of Service Managers. | | | | | Interview/ Application form/ assessment |
| 2. | The ability to communicate and present detailed financial information to finance and non-finance individuals/ groups at all levels of the organisation. | | | | | Application/Interview |
| 3. | Computer aptitude demonstrated by the ability to produce, evaluate and interpret data into meaningful information for managers and budget holders in a format that is relevant for the intended audience | | | | | Application Form/Interview |
| 4. | | The ability to work with non-finance members of staff, advising and guiding relating to the use of project appraisal techniques and value for money. | | | Application Form/Interview | |
| 5. | | Must be able to work to deadlines and manage time effectively, whilst demonstrating both team working and working on own initiative. | | | Application / Interview | |
| 6. | | Ability to advise Managers and budget holders about their budgets, the Council’s financial rules and regulations and the appropriate accounting treatment | | | Application Form/Assessment | |
| 7. | | The ability to build up relationships with others both inside and outside the Joint Finance Section. | | | Interview | |
| 8. | | The ability to identify and resolve problems relating to financial management in a proactive way and demonstrate a challenging approach to problem solving. | | | Application / Interview | |
| 9. | | A knowledge and understanding of the National, Corporate and Departmental Policies on Confidentiality, and the management and sharing of information. | | | Interview | |
|  | | **Competencies** – Please note the council’s corporate competencies, which are considered to be essential for all roles, are in the attached CORE COMPETENCIES document | | | Interview | |
| 2. | | **Experience/Qualifications/Training etc** | | |  | |
|  | | **Grade G Experience/Qualifications/Training etc** | | |  | |
| 1. | | Experience of working in a relevant financial setting for a period of 3 years. | | | Time served | |
| 2. | | Must be either AAT or Part Qualified (CCAB/Cim) and be willing to work towards completing CCAB/CIMA. | | | Assessment | |
| 3 | | Applicants must be willing to complete the CCAB/ CIMA qualification | | | Application | |
| 4. | | A high degree of knowledge and experience of creating and maintaining spreadsheets in order to analyse complex financial information. | | | Assessment | |
| **STAGE TWO** | | | | Will only be used in the event of a large number of applicants meeting the minimum essential requirements | | |
| **Additional Requirements** | | | | | | **Method of Assessment** |
| **1. Grade F Skills and Knowledge** | | | | | | |
| 1. | Demonstrate a knowledge and understanding of Local Authority financial systems and procedures. | | | | | Application Form / Interview |
|  | **Grade G Skills and Knowledge** | | | | |  |
| 2. | Demonstrate a knowledge of the changes facing Local government | | | | | Assessment |
| 3. | Demonstrate a knowledge and understanding of Local Authority financial systems and procedures | | | | | assessment |
| **2. Experience/Qualifications/Training etc** | | | | | | |
|  | **Grade G Experience/Qualifications/Training etc** | | | | |  |
| 1. | 2 years in Local Government Finance | | | | | Time served |
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| **Date Person Specification prepared/updated :** | **May 2022** |
| **Person Specification prepared by :** | **Group Accountant** |

**These core competencies are considered essential for all roles within Bolton Council. Please be prepared to be assessed on any of these during the interview process and, for the successful applicant, throughout the probationary period.**

**Developing Self & Others**

Promote a learning environment to embed a learning culture.  Support others to develop their skills and knowledge to fulfil their potential. Actively pursue your own development. Support and promote the principles of Investors in People.

**Civil Contingencies**

Bolton Council has a statutory duty under the Civil Contingencies Act to respond in the event of an emergency. If Bolton Council’s Emergency Management Plan is activated, you may be required to assist in maintaining key Council services and supporting the community.  This could require working outside of routine working hours and working from places other than your normal place of work.

**Equality & Diversity**

Uphold the principles of fairness and the Equality Act in all undertakings as a Bolton Council employee, including providing a fair, accessible service irrespective of customer’s race, religion, gender, sexuality, disability or age.

**Customer Care**

The ability to fully understand, assess and resolve the needs of all customers including those who present with complex situations, in a manner that respects dignity and expresses a caring & professional image.

**Health & Safety**

Take responsibility for the health and safety of yourself and others who may be affected by your acts or omissions, and comply with all health and safety legislation, policy and safe working practice, including participating in training activities necessary to your post.

**Data Protection and Confidentiality**

Ensure that any personal data or confidential data you hold is kept securely and is not disclosed, whether electronically, verbally or in writing, to any unauthorised third party. Follow Council policies and procedures on dealing with personal information and information assets, including The Code of Conduct, Data Protection, Acceptable Use and Information Security policies. Personal or confidential data should only be accessed or used for council purposes.

**Fluency Duty**

Should you be required, as a regular and intrinsic part of your role, to speak to members of the public in English, you must be able to converse at ease with customers and provide advice in accurate spoken English, as required byThe Immigration Act 2016.

**Working Hours**

The nature and demands of the role are not always predictable and there will be an expectation that work will be required outside of normal hours from time to time.

**Safeguarding**

This Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment. Should the role involve working with the above groups, you will be subject to an Enhanced Disclosure and Barred List check by the Disclosure & Barring Service.

**The values of an organisation are those key principles by which people are expected to work to day to day. They’re our culture and help define what is expected of each and every one of us**.





