



## **Job description questionnaire**

Please read 'Guidelines for managers on how to prepare job details for evaluation' before completing this questionnaire. If you have any questions your nominated Personnel Advisor can help you.

<b>Job title:</b>	<b>Strategic Business (Generic)</b>	<b>Finance Partner</b>	<b>Service area:</b>	<b>Finance</b>
<b>Reports to:</b>	<b>Head of Finance</b>		<b>Section:</b>	<b>Generic</b>
<b>Post number:</b>	<b>2189</b>		<b>Location:</b>	
<b>Date:</b>	<b>Oct 08</b>		<b>Job holder's name:</b>	

### **1. Purpose of job**

Please write one or two sentences about why the job exists. Focus on the achievement of the key end results of the job.

Provide financial expertise and assurance to contribute to the strategic leadership of the Finance Division and to support the overall stewardship of the Council's finances.

Provide financial expertise and assurance to support the Head of Finance in the effective management control of the Council's Medium Term Financial Strategy, corporate revenue budget, and capital programme,

Support the Head of Finance in servicing the strategic financial needs of internal customers and to lead and develop the provision of their accountancy, budgeting and financial advice.

### **2. Job context**

Give a short overview of the job context and the key objectives of the part of the organisation where the job is placed.

The role requires the post holder to have professional input into all financial strategies including the financial budgetary process including the MTFP, Capital Programme and budget monitoring.

The purpose is to support all in the Council and beyond to be successful, by providing high quality, responsive services and advice, to ensure the integrity of the Council's assurance and control arrangements are adequate and maintained.

To develop a financial support service for one organisation, ensuring support to customers in service delivery through the provision of infrastructure and technical support tools.

The jobholder provides professional financial guidance to Directors, Senior Managers and Cabinet Members. As part of the management team the jobholder also contributes to the overall strategic and operational management of the provision of financial services within the County Council.

As a member of the Finance Management Team contribute to the overall strategic and operational management of Finance Division

Lead, motivate and develop the staff of the team to ensure its objectives are achieved and to enhance its overall level of performance and morale.

Provide high level advice on accounting, budgeting and financial management to Councillors, Service Directors and other managers.

To ensure adherence to and advise on the application of legislative, regularity and both national and international accounting standards. Provide input on other financial management requirements which will lead to the development of Finance towards a world class service.

Ensure budgeting, monitoring and accounting functions are effectively discharged in accordance with agreed policies, formats and timescales.

To ensure that the services provided by the post-holders team are relevant and responsive to the needs of internal and external customers, taking account of customer feedback.

Develop effective relationships with appropriate national bodies and other local authorities, to inform and enhance the quality of the work of the post-holders team.

### 3. Main accountabilities

List, in order of importance, the main accountabilities which describe key end result areas of the job. Each should contain an action, what is to be achieved or purpose of the action and what the end result will be. **There should be at least 6 but no more than 9. See the end of this form for guidance.**

- 1 To lead the provision of technical guidance, both internal to and external to Finance and develop effective relationships with appropriate national bodies and other local authorities, to inform and enhance the quality of the work of the post-holders team
- 2 To lead the provision of financial direction, support, and analysis to all Service and Support Directorates. major partnership based projects, and other key capital related investment projects.
- 3 To support Councillors, Services and partners to improve their performance through the provision of strategic financial advice.
- 4 To contribute to the Financial Planning processes with strategic analysis, advice and recommendations to produce a Medium Term Financial Plan which delivers the objectives of the Authority.
- 5 As a designated Strategic Finance Officer, design and deliver bespoke financial training packages to Councillors, Officers and budget managers as required. To lead the development of financial business processes both within Finance and Directorates and support the implementation of these improved processes.
- 6 To facilitate the execution of the Council's Use of Resources and Value for Money strategies by providing financial support, analysis and interpretation.
- 7 To lead, motivate and develop the staff of the team to ensure its objectives are achieved and to enhance its overall level of performance and morale.
- 8 To ensure adherence to and advise on the application of legislative, regularity and both national and international accounting standards. Provide input on other financial management requirements which will lead to the development of Finance towards a world class service.
- 9 To contribute to strategic and operational management of the Finance Division overall.
- 10 To ensure that reasonable care is taken at all times for the health, safety and welfare of yourself and other persons, and to comply with the policies and procedures relating to health and safety within the Service.

- 11 Ability to demonstrate awareness/understanding of equal opportunities and other people's behaviour, physical, social and welfare needs.
- 12 To carry out any other duties which fall within the broad spirit, scope and purpose of this job description.

#### **4. Organisation structure**

(a) Please attach an organisation chart showing this job, its supervisor, colleagues who also report to the same supervisor and the jobs managed by the postholder, giving full job titles. **Please do not indicate grades.**

See appropriate chart

(b) Briefly describe the major responsibilities of the jobs managed by the postholder.

##### **Group Accountants**

Provides professional financial guidance to Directors, Senior Managers and Cabinet Members. As part of the management team the jobholder also contributes to the overall strategic and operational management of the provision of financial services within the County Council. Manage and develop the provision of accountancy, monitoring and financial advice in order to discharge statutory responsibilities on behalf of the S151 Officer and to support budget managers across all service groupings.

##### **Principal Accountants**

Support the jobholder; co-ordinate the monitoring process ensuring deadlines are met; manage the team on a day-to-day basis; co-ordinate input to the financial planning, revenue and capital budget-setting, and close-down processes; directly support and advise service managers, partners and Councillors on planning, control, process and management issues; manage and provide financial support on obtaining, securing, allocating and reporting on financial resources; interpret/analyse complex financial and non-financial information, and communicate findings/recommendations to colleagues in order to support decision-making; participate in, and contribute to, Finance projects; maintain and develop financial systems and processes; support the development of improved financial awareness of non finance managers and staff.

(c) Briefly describe the key differences between this job and the Line Manager's role.

The manager has six other reports and is responsible for a wider range of duties including accounting services, treasury management and CAA/Value for Money sections

## **5. Knowledge, experience and training**

What is the minimum knowledge/training/experience needed for the effective performance of the job? (This is not about the postholder's own experience/qualifications but the minimum requirements for performance of the job). It may help if you think about this as if you were recruiting to the post - what you would require from applicants.

- Educated to degree level or equivalent in a relevant subject, or by experience
- Qualified Accountant
- Knowledge/understanding of effective leadership/management of a group of professional and administrative staff
- Proven experience of communicating effectively with professional and technical finance staff and operational managers
- Proven experience of successfully developing and achieving agreed objectives in a service function/organisation
- Evidence of significant participation in implementing successful change, particularly in responding to the demands of an organisation that is going through a process of transformation and modernisation
- Understanding of how local government works, including the specific complexities of local government finance, and the major influences and challenges it faces
- Proven experience in the areas of financial planning, control and reporting.

## **6. Supervision and work planning**

(a) How does work get allocated in this job, i.e. what is the pattern of the work cycle (daily, weekly, monthly, annual, etc).

The posts main objectives are allocated via the Service Plan/PADP golden thread. The post holder is expected to work on his/her own initiative in developing the work plan for both this post and the sections reporting to the post. The post holder will have significant input into the financial strategies for the authority.

The financial processes drives the operational aspects of the work but the role as a senior manager has to give input and is given objectives that are driven by the strategy for the council.

Monthly targets are allocated to the main drivers of the section and are monitored by the management team

The post holder is expected to undertake work on his/her own initiative to achieve the objectives of the Section

From time to time work is also allocated from the Corporate Management Team and Finance Management Team.

(b) How regular is supervision and broadly what issues does it cover?

Monthly 1:1 meetings held with Head of Finance where progress towards objectives and priorities are monitored. Meetings are also used to discuss any issues, staff morale, training etc.

PADP both annually and six monthly progress

(c) Please give two examples of the sort of priorities which the postholder is able to set themselves.

1. The jobholder is able to set their own priorities and those of their team in order to achieve the deadlines within the timetables arising from the annual financial cycle for revenue and capital.

2. The post holder can determine the sections Key Performance Indicators

(d) Please describe the procedures or systems the job has to work within and how this affects the level of discretion the postholder is given. Or you could give two examples of procedures or systems they have to work within.

The post holder is given a very high degree of discretion within the job. He/she determines the staffing levels of the section and is responsible for prioritising the sections work in order to deliver the priorities and objectives.

The post holder has an important role to play in supporting Departmental management Teams and Finance Management Team. Whilst these will set the overall framework in which to operate the post holder will determine their own methods of delivery

The jobholder must abide by the financial regulations and principles of their profession / professional conduct. They must also work within the County Council's financial constitution and regulations, and within auditing procedures and systems.

The jobholder works within general County Council procedures and management guidelines – they have some discretion regarding the way they manage staff in their team.

(e) Describe how the postholder controls the work of people they manage in their team if applicable, i.e. weekly/monthly meetings, or setting tasks on a daily basis.

Weekly/Fortnightly management meetings are held. The progress against targets and projects are monitored and if necessary corrective action is taken.

In addition monthly 1:1 meetings are held with managers

In addition, all Accountants work in an open plan environment and hence are able to manage/assist staff on an ongoing basis, as well as operating an 'open

door' policy. Where there is any possibility that critical deadlines may not be met, SFM's will work together across Finance to prioritise and focus resources.

- (f) Does the postholder co-ordinate sub-functions of the service or service areas or set priorities for them? If so please give details and say why the co-ordination role is needed.

Some of the jobholders have a co-ordination role in relation to the key activities within the financial cycle, i.e. financial planning, budget-setting, budget monitoring, and closure of accounts. The co-ordination role is required to ensure that information is presented to Directors and Cabinet in a timely and consistent manner, and the whole Council position can be clearly seen.

## 7. Communication/contacts

Please detail the nature of the interpersonal skills the postholder has to use. Give two examples of the nature of interpersonal skills used. (Do not just list the people the postholder has to come into contact with).

The post holder needs to be both financially literate and capable of communicating very complex theories in an understandable manner. They must be able to demonstrate they can communicate with Chief Officers and members of the Authority. It is essential they can command the respect of these people as quite often it will be necessary to challenge, change or influence peoples opinions on matters.

The post holder must be able to manage a very large section of staff with a very high degree of professionalism, be capable of motivation during a high degree of procedural and cultural change.

The post holder must have the ability to interpret legislation and complex strategic issues and be capable of transferring these into priorities and objectives for the Section.

## 8 Problems encountered

- (a) Please give brief examples (a maximum of 3) of the problems encountered in this job and how they might arise. For the examples given, detail the steps you would expect the postholder to take to find the solution to the problem.

1. **Resources** – Over the past two years Finance have significantly downsized (30%) and are now undertaking another reduction exercise. It is not uncommon for a section to be requested to undertake urgent and complex work at short notice. The job holder must be able to organise his resources in a effective and efficient manner in order to deliver the additional work as well as the day job. Excellent people and negotiating skills are required as often a compromise will be necessary.
2. **Financial Challenges** – The post holder is often required to be innovative in their thinking in order to determine effective answers to very

complex financial problems. As a member of the Finance Management Team you are required to recommend different solutions such as finding the “gap” in the budget, savings to bring back current year overspends, methods of funding major projects. An all-round knowledge of Local Government Finance is essential.

3. **Legislative Changes** – Legislation is constantly changing the way we are required to report and account for issues. The post holder would be expected to comment on any proposals and analyse any changes within a Northamptonshire context. They would have to recommend ways forward and estimate how the new legislation effects the authority

(b) How does the postholder decide at which point they need to refer a problem on?

The post holder uses his/hers expertise and knowledge as to when to refer a problem upwards. They would be expected to deal with the vast majority of issues and the type of problem referred upwards would be those with a potential of embarrassment for the authority or has a high strategic/political risk

## 9. Making decisions

Please give two examples to show the ‘thinking challenge’ in the job, i.e. is there a set process to resolve the problem, does the postholder choose a solution based on their past experience or does the postholder have to seek more information to determine the extent of the problem, or use creative thinking to develop new concepts.

The jobholder uses past experience supported by financial regulations and the code of professional conduct to resolve many technical problems.

The jobholder also has to seek more information to determine the extent of the problem, such as investigating the land swap problem, and whether there were any exemptions for stamp duty VAT implications etc. Resolution of problems often requires the engagement of staff from a range of services within the Council, and it is important to be aware of all those on whom a change of procedure will impact.

The jobholder also has to use creative thinking, for example when there are implications for the service arising from changes to legislation. The jobholder has to think of ways to deal with the changes and put in place any new procedures required.



## 10. Freedom to act

(a) Please give two examples to show areas that the postholder has discretion over.

1. The jobholder has the discretion to decide how the team and work of the team should be organised to meet the service objectives.
2. The jobholder has full discretion regarding the advice they provide to service managers and councillors.

(b) What kind of systems, procedures or 'rules' are set around the job which prevent the postholder having total discretion as to how to undertake the job.

Normal financial regulations.

## 11. Area and type of impact

There are two ways of looking at the type of impact the job has upon the council.

- **The first is where the jobs impact can be expressed in financial terms** (annual income or expenditure). If you think the job falls in this category complete section a.
- **The second is where there is no relevant financial dimension to the job.** If you think the job falls under this category, please complete the following section b.

Please note that you must complete either **a) or b)**. Please complete section **(c)** for all jobs.

(a) Which parts of the organisation are most clearly influenced by the job's objectives? Please indicate current year income, expenditure and capital budget, if appropriate, and state the impact on each figure given, i.e. is there a controlling impact; or partnership/ joint accountability for the area (if so with which other jobs). Or is the impact indirect because the job is advisory and influences decisions taken in the area of impact?

The jobholders are responsible for providing revenue accountancy support to budget holders across the County Council who manage the Authority's gross expenditure budget of £988m for 2008-09 (£380m net). The jobholders also monitor the capital expenditure (an estimated £175m in 2008-09). One of the jobholders has responsibility for day-to-day Treasury Management (i.e. management of the County Councils loans, investments and cash-flow) and another has responsibility for major infrastructure projects and PFI Schemes. All jobholders have a role in advising budget managers on the maximisation of external income (including grants).

or

(b) What kind of support services are delivered by the job - does it involve processing information, interpretation/analysis of information, supervision of others, or acting in an advisory/specialist capacity?

**and**

(c) Is there any statistical information that can add to the understanding of the job, i.e. it is useful to know whether a Payroll Officer deals with 50 or 50,000 payslips and whether they pay people weekly and/or monthly. Figures for their own sake are no help, but those directly relevant to the purpose of job are useful. e.g. providing a daily home care service to ten clients.

The jobholders monitor annual capital expenditure of £175m across all service areas, providing support to approximately 60 capital budget managers.

The jobholders support approximately 350 managers of revenue budgets, (total net budget £380m).

## **12. Physical effort and/or strain**

Describe whether the job requires physical effort and/or strain more than is normally experienced in a routine office environment, i.e. lifting heavy objects, how heavy are the objects, how are they carried, for how long and how often would this happen?

## **13. Working environment**

Does the job require working outdoors, or being exposed to objectionable, uncomfortable or unfavourable working conditions and is the postholder able to predict or plan for the elements faced?

## **14. Change statement**

Please briefly outline why the job is presented for job evaluation. For jobs that have changed, describe the **major** differences between the old and new job descriptions.

<b>Agreed by:</b>	
<b>Job holder(s):</b>	
<b>Completed by:</b>	(line manager)
<b>Approved by:</b>	(Corporate Director or Service Head)