

CROYDON COUNCIL

ROLE PROFILE AND PERSON SPECIFICATION

DIRECTORATE: Resources

DIVISION: Finance

JOB TITLE: **Finance Manager**

ROLE PROFILE

Job Title:	Finance Manager
Directorate:	Resources
Division:	Finance
Grade:	Grade 17
Hours (per week):	36
Reports to:	Head of Strategic Finance
Responsible for:	Principal Accountants, Senior Accountants, Accountants, trainees and apprentices
Role Purpose and Role Dimensions:	<p>To be responsible for leading a successful finance team to deliver the core financial management processes within their area(s). These may include some or all of the following:</p> <ul style="list-style-type: none">• Budget setting at the Directorate and overall Council level, including the Council Tax setting cycle and associated Cabinet reports.• Production of the year-end financial accounts, the associated close down processes and preparing for and responding to external audit.• Budget monitoring. This includes leading the team to challenge directorates/services on the best use of resources available and ensure compliance with the Council's corporate financial framework. It will also include providing high quality professional financial support and advice. <p>The role will oversee effective financial management to support delivery of the Council's vision, objectives and priorities as set out in the corporate plan and directorate plans within budget, making best use of resources available.</p> <p>The post holder will act as a role model for their team, leading the way in producing high quality work.</p> <p>The post holder will be expected to act as an effective line manager by:</p>

- providing day to day management of their team
- providing regular feedback and coaching
- delegating work appropriately

The post holder will be expected to deputise for the Head of Strategic Finance, including dealing with Head of Finance, Directors, Executive Directors and Cabinet Members when required.

Commitment to Diversity:

The council has a strong commitment to achieving equality of opportunity in its services to the community and in the employment of people. It expects all employees to understand, comply with and promote its policies in their own work, undertake any appropriate training to help them to challenge prejudice or discrimination.

Key External Contacts:

- Finance and operational staff at all levels
- Finance and operational staff at all levels in other public bodies (e.g. government departments/NHS, London Councils, GLA)
- External audit and consultants

Key Internal Contacts:

As this post is central to the management of the budget and monitoring processes across the Council the post holder will deal with:

- Corporate Directors, Directors and Heads of Service in client directorates
- Members
- Internal Audit
- Service managers
- Other staff at all levels, both within and outside the finance family.

Financial Dimensions:

No budgets under the post holder's control. However, the post holder manages the key financial processes and advises on budgets in a range of c£40-£200m.

Key Areas for Decision Making:

- Prioritising the workload of the team
- Identification of areas of opportunity or risk and action proposed.
- Providing expert advice on issues and finance implications of new developments.

Other Considerations:

- The post requires a high level of political awareness and sensitivity.
- This is a generic post and post holders will be expected to transfer between equivalent jobs within the Finance division from time to time as required by the Director of

Finance.

- Required to attend evening meetings from time to time.
- Duties and responsibilities are intended to be a guide to the range and level of work expected of the post holder. This is not an exhaustive or exclusive list of tasks that may fall to the post holder and employees will be expected to carry out such other reasonable duties which may be required from time to time.
- The Council reserves the right to update your role profile, from time to time, to reflect changes in, or to, your job. You will be consulted about any proposed changes.

Is a satisfactory disclosure and barring check required?

[\(click here for guidance on DBS\)](#)

Standard DBS check

What level of check is required?

Is the post politically restricted

[\(Click here for guidance on political restriction\)](#)

No

Is the post exempt from the Rehabilitation of Offenders Act (ROA) 1974

[\(Click here for guidance on ROA \)](#)

No

Key Accountabilities and Result Areas:

Key Elements:

People management

This will involve:

- Acting as day to day line manager for assigned team members
- Provide regular coaching and feedback in order to improve performance and provide support

- Active and timely review of team members' work to ensure it is accurate and of sufficient quality
- Supporting team members to maintain skills and CPD

To manage the financial and management accounting processes for a range of services covering revenue and capital.

This includes:

- **Council tax setting cycle**
- **Financial close and external audit**
- **Budget preparation**
- **Budget monitoring**
- **Accounting record maintenance and completion of final accounts, grant claims and statistical returns**
- **Financial analysis**

This will involve:

- Acting as project manager for key outputs, overseeing the delivery of relevant elements and pulling together the relevant outputs
- Having responsibility for ensuring that all of the outputs of the individual and team members are of high quality and produced to relevant deadlines. Putting in place quality assurance arrangements e.g. review of work to ensure that this happens.
- Lead and manage the team in producing financial information including long term forecasting and planning. This will support effective and appropriate decision making.
- Lead and manage the team in delivering effective financial processes to ensure that accounting records and information are comprehensive and meet statutory and corporate best practice requirements.
- Working with the service to provide robust information, including forecasts of expenditure, efficiency plans and budget recovery plans. Review and challenge the financial information to ensure that it is accurate and relevant to its purpose, meeting corporate

requirements as well as those of the directorate.

- Identify and proactively respond to financial risks (such as overspending) and opportunities, advising on action and escalating where appropriate.
- Keeping up to date on and advising on the financial implications of new legislative and service developments.
- Seeking out opportunities for additional sources of income, funding or efficiency
- Provide appropriate challenge and support to Heads of Service and Directors to ensure decisions being made are deliverable.
- Develop and maintain an effective working relationship with the service, through meeting with Directors, Heads of Service and other budget holders to review and advise on financial strategy, issues and operational performance.

To drive the improvement of financial processes and systems and the adoption of best practice in financial management.

This will involve:

- Regularly considering the effectiveness of financial processes and the use of information systems to ensure that they are aligned to the changing demands of the directorate and the corporate organisation.
- Working with service managers to develop and extend best practice and efficiency in financial processes systems (with a direction of travel of

increasing corporate standardisation).

- Collaborating with other finance colleagues to share best practice in financial processes (with the aim of driving standardisation where appropriate)
- Taking responsibility for maintaining professional skills, for example in using IT software, financial modelling and wider sector developments
- Identify and take advantage of any training opportunities in order to maintain CPD

To provide high quality financial advice and support to colleagues.

This includes ensuring that all managers maintain an up to date knowledge of the financial framework and their role within it and that they have the skills to fulfil their financial management roles effectively. Ensure that the directorate complies with Value for Money accounting principles.

This will involve:

- Forming a strong understanding of directorate services and issues and promoting a strong collaborative relationship between Finance and budget managers.
- Identification of key financial issues and provision of strategic advice on appropriate action in terms of procedure and / or business action. Escalation of issues where appropriate.
- Supervising financial support across a range of financial projects and issues and ensuring that finance staff are deployed effectively to priority issues.
- Meeting regularly with Directors, key budget holders / other finance staff
- Working with colleagues

to provide relevant guidance and training to non-financial staff

- Take the lead on producing high quality briefing notes; drafting financial information and analysis clearly and concisely for non-financial readers
- Providing financial analysis for corporate outputs, for example Cabinet Reports and responses to Members
- A good awareness and effective management of sensitive service and political issues.

**To contribute to the wider agenda
This includes ensuring that the wider
objectives of the Directorate and Council
overall are met.**

This will involve:

- Having an understanding of the Directorate service plan and ensuring that everyone in the team is working to these objectives.
- Leading the team's contribution to council wide projects when the opportunity arises
- Acting as a professional ambassador of the Finance Team. This will include deputising when necessary.

Confidentiality

- Treating all information acquired through employment, both formally and informally, in confidence. There are strict rules and protocols defining employee access to and use of the council's databases. Any breach of these rules and protocols will be subject to disciplinary investigation. There are internal procedures in place for employees to raise matters of concern regarding such issues as bad practice or mismanagement.

Data Protection

- Being aware of the council's legal obligations under the Data Protection Act 2018 (the "2018 Act") and the EU General Data Protection Regulation ("GDPR") for the security, accuracy and relevance of personal data held, ensuring that all administrative and financial processes also comply.
- Maintaining customer records and archive systems in accordance with directorate procedures and policies as well as statutory requirements.
- Treating all information acquired through employment, both formally and informally, in accordance with the Workforce Data Protection Policy.
- There are strict rules and protocols defining employee access to and use of the council's databases. Any breach of these rules and protocols will be subject to disciplinary investigation. There are internal procedures in place for employees to raise matters of concern regarding such issues as bad practice or mismanagement.

Contribute as an effective and collaborative team member

This will involve:

- Participating in training to demonstrate competence.
- Undertaking training as required for the role.
- Participating in the development, implementation and monitoring of service plans.
- Championing the professional integrity of the service.

Equalities and Diversity

- The council has a strong commitment to achieving equality of opportunity in its services to the community and in the employment of people. It expects all employees to understand, comply with and promote its policies in their own work, undertake any appropriate training to help them to challenge prejudice or discrimination.

Health and Safety

- Being responsible for own Health & Safety, as well as that of colleagues, service users and the public.
- Employees should co-operate with management, follow established systems of work, use protective equipment and report defects and hazards to management.
- Managers should carry out, monitor and review risk assessments, providing robust induction and training packages for new and transferring staff, to ensure they receive relevant H&S training, including refresher training, report all accidents in a timely manner on council accident forms, ensure H&S is a standing item in team meetings, liaise with trade union safety representatives about local safety matters and induct and monitor any visiting contractors etc, as appropriate.

Person Specification

Job Title: Finance Manager

Essential knowledge:

- A CCAB/CIMA accountancy qualification or extensive knowledge and experience of local government finance.
- Extensive knowledge and experience of budget setting, financial monitoring (capital and revenue) and closing the accounts
- Knowledge of value for money principles to ensure the most cost effective outcomes are achieved within limited resources
- Knowledge of the main business areas and current issues relevant to the directorate supported.

Essential skills and abilities:

- Excellent oral, written and presentational skills and the ability to explain complex matters to non-financial staff
- Strong analytical skills and lateral thinking to develop creative and innovative service solutions
- Ability to identify, lead and implement reviews for key financial processes that lead to significantly improved outcomes
- Ability to plan, lead and review the work of a team.
- Ability to manage, motivate and develop staff.
- Ability to set personal priorities, objectives and deadlines while maintaining a focus on the key service priorities/accountabilities, as well as the resilience and drive to meet the demands and pressures of the post
- Ability to deputise for senior managers as required
- Excellent interpersonal skills and the ability to build strong working relationships
- Ability to take ownership for personal and professional development
- Ability to take the lead in developing, evaluating, implementing and monitoring council priorities/strategies relevant to financial risks and issues

Essential experience:

- Experience of advising and challenging senior managers on financial management issues
- Experience of successfully operating in a political environment
- Significant knowledge and experience of general ledger packages and other IT packages
- Experience of line management including coaching and providing feedback
- Experience of building and participating in teams, particularly cross directorate teams
- Track record of promoting equality of opportunity

Special conditions: None.