**Job Description**

This form is used to provide a complete description of the specific job and defines the required skills, knowledge, behaviours, qualifications and experience.

# Section A: Job Profile

The job profile provides key information relating to the salary and working conditions e.g. location of a job, along with the current focus of the role and a brief description of the main duties.

## Job Details

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| Job Title: | Financial Planning & Reporting Manager |
| Salary: | £68,742 - £72,041 |
| Grade: | 18 |
| Hours: | 37 per week |
| Team: | Corporate Finance |
| Service Area: | Finance  |
| Primary Location: | County Hall, Oxford, with some flexible working available  |
| Budget responsibility: | None directly |
| Responsible to: | Head of Corporate Finance |
| Responsible for: | Planning & Reporting Team (6 FTE to be confirmed) |
| Politically restricted: | Yes |

## Job Purpose

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| This is a brief overview of the key objectives of the job including the context within the team/department.Operational Manager leading a team providing the council’s Financial Planning and Reporting function. Responsibility for managing the delivery of the council’s Financial Strategy, and the lead on the financial planning and reporting process. This includes managing risks and opportunities to the financing of the council’s services, priorities and desired outcomes for the short, medium and longer term. The post has responsibility for the co-ordination of the council’s Financial Strategy, producing the Medium Term Financial Plan, and annual Council budget. To do this the post collaborates as the senior advisor with the Cabinet, (and Opposition Groups), the Strategic Leadership Team (SLT), the Council Management Team (CMT), Directors and the Business Partnering Functions, as well as the wider Finance team. This post also has responsibility for the delivery of accurate and timely reports, advice and information to Cabinet, SLT, Members and Partners (where the Executive Director for Resources and S151 Officer is the Accountable Officer). |

## Job Responsibilities

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| This is a list of the main duties or tasks that the post holder will be expected to undertake.* Lead the Financial Planning and Reporting Function, including the management of a team of finance professionals, providing an effective and efficient service.
* Ensure that staff resources are allocated according to priorities and in order to meet statutory and council deadlines.
* Prepare and monitor the council’s Financial Strategy and key performance indicators.
* Plan, co-ordinate, communicate and manage the financial planning and reporting process for the council.
* Pro-actively manage budget modelling and scenario planning for expenditure including the impacts of inflation and anticipated future demand for services and advise on future funding available to the council.
* Keep up to date and informed, including horizon scanning for future risks and opportunities, regarding economic factors that can impact on budgets and the Financial Strategy, preparing briefings for key stakeholders (including Cabinet, Opposition Groups and councillors, SLT and CMT)
* Manage the production of updates, reports and presentations to CMT, SLT, Cabinet, Performance & Corporate Services Overview & Scrutiny Committee and Council.
* Manage support to both Cabinet and the Opposition in developing and agreeing their budget proposals.
* Manage the financial reporting cycle for revenue budgets and co-ordinate with other teams to ensure that performance, finance and risk information is aligned, meaningful and consistent.
* Liaise with the Cabinet Member for Finance and other key stakeholders and respond as appropriate to ensure financial reports meet their needs.
* Maintain a critical overview and challenge in the production of financial reports, ensuring the reporting is complete, consistent, adds value to decision making and accurately presents the financial performance and risk across the Council.
* Manage and co-ordinate the resources that support the Chief Accountant in the year end closedown of the accounts and production of the final accounts; the completion of the Whole of Government Account returns and other statutory returns; and the external audit process.
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# Section B: Selection Criteria

This section provides a list of essential and desirable criteria that detail the skills, knowledge, behaviours, qualifications and experience that a candidate should have in order to perform the job. The selection criteria provide a list of essential (no more than 8-10) and desirable criteria (no more than 4). The criteria are aligned to our [corporate values](https://www.oxfordshire.gov.uk/council/about-your-council/working-oxfordshire-county-council/county-council-values).

Each of the criteria listed below will be measured through; the application form (A), a test / exercise (T), an interview (I), a presentation (P) or documentation (D).

You must provide a supporting statement as part of your application which includes examples and evidence of when you have demonstrated the criteria listed below. You will be expected to address each point separately and in the order listed. If you do not complete a full supporting statement in the requested format your application may be rejected.

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| Essential Criteria | Assessed By: |
| CCAB Qualified with significant post qualification Finance / Accounting experience. | A,I,D |
| Ability to communicate effectively with internal and external audiences, including members, in order to inform, instruct, persuade and encourage feedback.  | A,I,T |
| Good knowledge of Local Government Financing including statutory accounting regulations and guidance with an aptitude for understanding and interpreting new and changes to regulations and legislation. | A,I,T |
| Extensive knowledge and understanding of financial policy, practices and procedures and how to ensure these are effective and maintained.  | A,I,T |
| Extensive knowledge of local government and wider sector / external influences including political sensitivities. | A,I |
| Strong ICT skills including extensive knowledge and ability to use spreadsheets; and able to utilise business systems effectively.  | A,I |
| Experienced in working with Senior Managers with the professional knowledge and ability to influence decisions, address poor performance and identify opportunities and innovation through sound reasoning, risk assessment and a sound understanding of the organisational objectives over the short, medium and long term.  | A,I |
| Experience in the identification and appraisal of financial risk, with the ability to apply a proportionate approach when advising on the management of those risks consistent with the council’s risk appetite.  | A,I |
| Experience and aptitude to work collaboratively with Members, colleagues, and partners in problem solving and making informed and insightful decisions  | A,I |
| A lateral thinker who is highly motivated, positive and inquisitive with an aptitude for learning, problem solving, developing innovative ideas, and continuous improvement. | A,I |
| Positive and flexible attitude with excellent organisation and time management skills | A,I |
| Behaviours and Key CompetenciesThe following are the generic behaviours expected from all finance staff * Has a positive and optimistic attitude
* Always looks to improve ways of working
* Is inquisitive and actively owns and seeks to solve problems
* Takes personal responsibility to find things out and develop and share knowledge
* Communicates and collaborates pro-actively
* Builds trust-based relationships
* Demonstrates ethical behaviours as set out in the ethical standards framework

These staff behaviours will be demonstrated in conjunction with the following key competencies* Is commercially aware – i.e. understands the cost drivers and true costs of services and considers the value in everything we do.
* Able to listen, understand, and respond constructively to the viewpoints of others.
* Able to challenge constructively, join the dots, and see the wider implications, across services, processes and issues.
* The ability to communicate clearly and openly with others in order to inform, instruct, persuade and encourage feedback.
* Demonstrates a can-do attitude and focuses energy and commitment on achieving positive results that are critical to the organisations success.
* Understands the role of the organisation, and the needs and expectations or internal and external customers, working professionally and innovatively to meet or exceed those needs and expectations
* Demonstrates an open mind to challenge traditional approaches in a positive way, develops innovative idea, solves problems and continually improves performance.
* Collaborates and consults with others effectively, in joint pursuit of team and organisational goals.
* Understands the environment in which the organisation operates and considers the financial and wider commercial implications of their decisions and actions.
* Demonstrates the appropriate level of specialist knowledge and skills required to effectively fulfil the role and ensure continuous development
 | A,I |
| Desirable Criteria | Assessed By: |
| Knowledge of the financial framework in which the Council operates e.g. Constitution, Financial Procedure Rules / Regulations | A,I |
| Relevant experience in Local Government | A,I |
| Relevant experience of using SAP | A,I |

# Section C: Pre-employment Checks

All appointments are subject to standard pre-employment screening. This will include identity, references, proof of right to work in the UK, medical clearance and verification of certificates. Further information can be found here [Pre-employment checks](https://www2.oxfordshire.gov.uk/cms/content/support-attending-interviews)

Additional pre employment checks specific to this role include:

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| --- | --- | --- | --- |
| [ ]  | Enhanced Disclosure and Barring Service check with Children’s and Adults Barred List | [ ]  | Enhanced Disclosure and Barring Service check without [an Adult/Children’s barred list check](https://intranet.oxfordshire.gov.uk/cms/content/safer-recruitment-and-disclosure-and-barring-service-checks#enhanced-dbs-check-without-an-adult-childrens-barred-list-check) |
| [ ]  | Enhanced Disclosure and Barring Service check with Children’s Barred List | [ ]  | Enhanced Disclosure and Barring Service check with Adults Barred List |
| [ ]  | Standard Disclosure and Barring Service check | [ ]  | Basic Disclosure |
| [ ]  | Disqualification for Caring for Children (Education) | [ ]  | Overseas Criminal Record Checks |
| [ ]  | Prohibition from Teaching | [ ]  | Professional Registration |
| [ ]  | Non police personnel vetting | [ ]  | Disqualification from Caring |
| [ ]  | Other (please specify):       |  |  |

# Section D: Working Conditions

This is a guide to the working conditions and the potential hazards and risks that may be faced by the post-holder.

## Health and Safety at Work

You are responsible for your own health, safety and wellbeing, and undertaking health and safety duties and responsibilities for your role as specified within Oxfordshire County Councils Health and Safety Policy.

The potential significant hazard(s) and risk(s) for this job are identified below (those ticked).

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| [ ]  | Provision of personal care on a regular basis | [ ]  | Driving HGV or LGV for work |
| [ ]  | Regular manual handling (which includes assisting, manoeuvring, pushing and pulling) of people (including pupils) or objects | [ ]  | Any other frequent driving or prolonged driving at work activities (e.g. long journeys driving own private vehicle or a council vehicle for work purposes) |
| [ ]  | Working at height/ using ladders on a regular/ repetitive basis | [x]  | Restricted postural change – prolonged sitting |
| [ ]  | Lone working on a regular basis | [ ]  | Restricted postural change – prolonged standing |
| [ ]  | Night work | [ ]  | Regular/repetitive bending/ squatting/ kneeling/crouching |
| [ ]  | Rotating shift work | [ ]  | Manual cleaning/ domestic duties |
| [ ]  | Working on/ or near a road | [ ]  | Regular work outdoors |
| [x]  | Significant use of computers (display screen equipment) | [ ]  | Work with vulnerable children or vulnerable adults |
| [ ]  | Undertaking repetitive tasks | [ ]  | Working with challenging behaviours |
| [ ]  | Continual telephone use (call centres) | [ ]  | Regular work with skin irritants/ allergens |
| [ ]  | Work requiring hearing protection (exposure to noise above action levels) | [ ]  | Regular work with respiratory irritants/ allergens (exposure to dust, fumes, chemicals, fibres) |
| [ ]  | Work requiring respirators or masks | [ ]  | Work with vibrating tools/ machinery |
| [ ]  | Work involving food handling | [ ]  | Work with waste, refuse |
| [ ]  | Potential exposure to blood or bodily fluids | [ ]  | Face-to-face contact with members of the public |
| [ ]  | Other (please specify):      |  |  |

**Agile Working**

All staff may be required to work from a different base or in a different location at some point in the future in line with any Council or school needs.  Such changes will be made after proper consultation and shall be deemed to be reasonable after taking into account any personal requirements.