

ROLE PROFILE

Job family	Manager	Role profile number	MA14-2273	Grade N
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Job purpose: To manage a team responsible for delivering a service.

Grade N posts focus on the strategic management of a team of staff. Grade N posts are higher in 'Contacts & Relationships' with the requirement to act strategically in resolving problems across a range of contentious and complex issues. Posts at this level will require significant relevant experience at a technical/professional level within a related specialist field.

Factor	Relevant Job Information
Supervision and/or Management of People	Full accountability for a team of staff including; managing performance, monitoring quality and quantity of work; disciplinary matters; employee wellbeing; training and development
Indicative qualifications	Degree in relevant profession, or equivalent experience/skills Licence / certificate / qualification required for the role ITQ 2 or equivalent ICT skills and abilities, demonstrating significant experience in IT systems Level 5 in management or equivalent experience
Knowledge and Skills	Experience of managing, motivating and developing multiple teams of staff involving different workstreams Experience of managing staffing budgets Significant relevant professional experience post qualification in a similar work environment. Significant experience of leading complex and diverse areas of work involving a wide range of contacts which has a high impact on the organisation Expert knowledge of relevant policy, systems, work practices, professional guidelines, legislation and a good understanding of emerging developments in the area of specialism. Excellent ICT skills including use of Microsoft applications and specialist systems Excellent organisational skills and the ability to prioritise workloads of a team to achieve deadlines Thorough knowledge of other areas of the authority relevant to the service. Ability to interpret and analyse statistical and numerical data, drawing conclusions from the data to inform decision making. Experience of defining and developing systems, policies, procedures and / or practices. Experienced project manager with a good understanding of project management methodologies and systems. Excellent time management skills to manage a complex workload prioritise and set deadlines. Transformation management skills to advise on process flow, removal of waste and duplication within and across service areas. Ability to produce business focussed, user friendly reports, policy and project documents where appropriate. Authority and credibility to build relationships and engage successfully with colleagues, customers and partners
Creativity and Innovation	Work on own initiative to manage own activities and the work of the team contributing to longer term activities / plans for the service area. Creative problem solving of issues, proactively anticipate problems and deliver solutions which enhance the quality and efficiency of services and the reputation of the council. Think and act strategically in problem solving and decision making in a complex political and business environment. A level of discretion is required in deciding what course of action to take and how to operate within the policy framework. Allocate work to the team monitoring quality and outputs Proactively manage staffing issues Responsible for meeting performance standards within a policy framework and regulatory guidelines. Considerable scope to exercise initiative in taking action - within the boundary of well-defined policies.

	<p>Research and resolve problems, provide advice and guidance to the team on processes and procedures</p> <p>Lead research and development of systems, policies, procedures and / or standards within specialist area</p> <p>Analyse data/information to highlight and prioritise issues for further investigation, recommending solutions where appropriate.</p>
Contacts and Relationships	<p>Provide advice and guidance to senior managers and the leadership team on a broad range of complex issues which could be contentious and challenging in nature.</p> <p>Ability to build strong relationships and engage successfully with colleagues /partners /customers / contractors and suppliers.</p> <p>Confident and expert at negotiation and advocacy, displaying tact and diplomacy to deal with complex situations. Ability to make difficult decisions to resolve issues and improve service delivery.</p> <p>Deal with people at all levels confidently, sensitively and diplomatically.</p> <p>Provide advice to resolve a range of queries from internal / external customers, will be dealing with highly challenging situations where influence could be required.</p> <p>Regular contacts will include: senior managers, leadership team, councillors, external bodies and partners.</p>
Decisions – Discretion & Consequences	<p>Decisions lead to the setting of working standards and important procedures for the service area which have an impact across the organisation.</p> <p>Use initiative to manage responses to complex business / technical issues within the service.</p> <p>Make business decisions based on up to date specialist knowledge and analysis.</p> <p>Contribute to developing council strategy within the service area.</p> <p>May involve dealing with conflicting priorities alongside high volume workloads.</p> <p>Lead initiatives to design and deliver improvements.</p> <p>The consequences of the decisions will have a significant effect across the organisation.</p>
Resources	Little or no responsibility for physical or financial resources
Work Demands	Work subject to interruptions and deadlines, involving changing problems, circumstances or demand.
Work Environment	Office based, but may involve some travelling to other council buildings
Our Identity	<p>Our Identity sets out who we are and provides a shared understanding of how we are all expected to lead, work and act with each other, our partners and our residents to deliver our services and build stronger communities. They enable us to continually evolve and adapt to meet the changing needs of our residents and ensure that we continue to deliver great services and make a difference to the people of Wiltshire.</p> <p>All of us are expected to demonstrate the ten elements of Our Identity in how we work to shape and create the organisation we want to be part of. It should influence our decisions, activities, projects and ways of working</p>
Health & Safety	To be responsible for managing services in line with the council's health, safety and welfare policies
Equalities	Wiltshire council is committed to ensuring employees do not discriminate against colleagues, suppliers or third parties at work or harass or victimise others. Incidents of discrimination at work are taken seriously and employees are encouraged to report incidents via their manager or anonymously via the whistleblowing policy .
Authority to work in the UK	All employees must have the legal authority to work in the UK. Non-EU nationals must have the relevant approval to work in the UK from the UK Border Agency. Copies of all documents provided as proof of identity are retained for our records, by providing these proofs the council will treat this as consent.

The above profile is intended to describe the general nature and level of work performed by employees in this role and does not detail a list of all duties and responsibilities. The Council reserves the right to amend this role profile as necessary.

ROLE DESCRIPTION

Role description:	Principal Accountant	
Role profile family:	Manager	
Role profile number and grade:	MA14-2273	Grade N
Number of posts:	6	
Number of staff managed :		
Service/Team:	Finance	
Reports to:	Chief Accountant & Head of Finance	

Job Family overview

Manager job family overview:

For the lower grades it is the expectation that the role will be to support remote team working and management is for the day to day responsibilities of the team.

For the higher grades full accountability of all elements of management of a team of staff including accountability for quality and quantity of work.

This includes, but is not limited to the following:

- The team is competent, effective and motivated
- Work is effectively delegated and delivered to the required standards
- Appraisals are undertaken for all staff within the team
- Effective team meetings and one to one meetings take place regularly
- Recruitment, induction, development, employee relations and all HR processes and planning are completed to the required standards and timescales

Service / function Context

The overall responsibilities of the service/function are:

- Providing the right financial information to decision makers within the council that ensure the council remains in budget, lives within future funding and can demonstrate best value
- Providing accounting support to services and on major project teams through financial analysis and option appraisal
- Providing interpretation of government and other policy direction, advising on options and impacts for the council, its services and the financial implications.

- Responsible for the maintenance and development of the council's financial plans and its records and the resultant production of the council's statement of accounts, budget monitoring and setting, and government returns, ensuring that all decisions are taken in the light of available funds and within the council's financial procedures and policies and government policies and regulation.

Job Purpose

To assist and support the Chief Accountant/Head of Finance in the efficient and effective provision of a comprehensive Finance Function. Working effectively within and contributing to an excellent team that meets the customer and corporate needs.

Be responsible for leading and managing a team of technical Accountants and Assistants to ensure the accuracy and completeness of the Council's revenue; and/or HRA; and/or Schools; and/or Capital; and/or Collection Fund, as well as the ongoing financial records relating to those accounts.

Working to the direction of the Chief Accountant / Head of Finance, carry out necessary duties to assist in the closedown of the Council's Annual Statement of Accounts, in accordance with statutory requirements and the Council's policies and procedures and government policies.

A Principal Accountant will be given responsibility for deputising for the Chief Accountant/Head of Finance as appropriate.

To contribute to the strategic development of the service through membership on various steering groups and management groups within the council and across partner organisations.

To interpret and advise on government regulation and policy including being responsible for coordinating and feeding into responses to government consultations such as those where changes in regulation and policies are proposed to reflect the view of the council and the impact of changes proposed. This will also include advising on the risk and mitigations for the council and its services, with specific reference to the financial implications of government regulation and policy.

This role provides professional skills based on knowledge and skills to deal with more complex areas of the Council's business, e.g., Housing (£85m) funds.

Specific duties and responsibilities to include areas such as:

- Plan, manage and deliver a service to meet the vision of the finance service and deliver to the service plan objectives.
- To work with senior council officers to contribute to the strategic planning and shaping service delivery. To contribute by suggesting ideas, challenging and providing management information to Directors, Assistant Directors and Heads of Service in the shaping of strategic visions and policies.
- Take specific responsibility for the more complex (value and transactional) areas, for example linking expenditure and activity in areas such as Adult Social Care, Waste, Children's Social Care, etc, to ensure finance and performance can be analysed and reported together.

- To be responsible for complex technical financial accounting areas, for example asset accounting, lease accounting, etc to ensure policies, systems and process meet regulation and identify impacts for financial planning purposes.
- Through the development of close and supportive working relationships with relevant officers at all levels across the Council, identify the need for management information and accounting systems which will enable secure budget monitoring and control. Supervise the efficient production of monthly revenue/capital/schools/HRA (as appropriate) budget monitoring and outturn projections to the highest level of completeness and accuracy, within deadline, and ensuring that trends and reasons/alternatives where under/overspend are identified. Identify further analysis and follow up to support investigation of significant variances from budget via ad-hoc reports. Ensure profiles are realistic and reflect trends.
- To review and identify areas for development/ improvement of the Council's financial system (ERP), in line with statutory and professional practices, and assist in the implementation of improvements. Feedback to Chief Accountant areas where data / processes could be improved to ensure efficiencies in the monitoring and setting of budgets as well as accounts closedown.
- Assist with the regular upkeep of the Council's Financial Procedure Regulations and to ensure that they are being effectively applied / complied with. Ensuring the Service control environment over such areas as virements, reconciliations and journals is managed in accordance with Financial Regulations.
- To provide professional advice, via financial comments, as directed on all member & officer decisions (routine and ad-hoc). To contribute to the production of specific & one-off Finance reports to CLT/Members as directed by the Chief Accountant/Head of Finance, for approval by the Section 151 Officer or their deputy, including interrogation of the financial ledger and production of key reports such as the Business Plan / Medium Term Financial Plan, Annual Council Tax setting report & budget monitoring. This includes evaluating business cases and saving/investment proposals.
- Interrogation of the financial ledger to facilitate preparation and production of complex financial analysis and/or modelling in order to facilitate management decisions within services or on Corporate projects. Examples include large service procurement projects and cross service projects such as the ERP replacement programme which affect the whole council.
- Be responsible for maintaining the integrity of the finance and accounting information, including ensuring financial controls are maintained and Line of Business Systems that integrate with the council's ERP system are regularly reconciled.
- To have a detailed and comprehensive understanding of the impact of developments in national/international financial standards and effective legislation on working and accounting practices within the council. To ensure this is embedded in all work across the council to ensure compliance with up-to-date accounting regulations.
- When working on major and cross service projects the post holder needs to be able to recognize the impacts of proposals and costs on other service areas, e.g., costs of cash collection, costs of changes to processes, impact on accommodation costs, calculating the full cost of proposals including corporate support recharges, and impacts on other areas
- Ensuring the provision of expert advice and guidance to all levels of employees, which is appropriate, accurate and timely (verbal and written) in relation to all aspects of the Finance function, in accordance with the Council's policies & procedures.

- Promote awareness of good financial practice and control. Helping plan and deliver regular learning and development to budget holders, in order that they are equipped to understand and manage budgets for which they are responsible (including access and usage of the council's ERP system).
- To manage the Housing Revenue Account, preparing monthly monitoring budget setting and annual closedown.
- To manage the Collection Fund, preparing statutorily compliant models for financial planning and monitoring purposes and being responsible for the liaison with precepting partners, such as Wiltshire Police, Dorset and Wiltshire Fire Service and Parish and Town Councils.
- To take responsibility for drafting Director of Finance comments on Cabinet and other decision reports, using professional financial expertise and applying financial regulations and legislation.
- To work proactively and with little direction to develop meaningful benchmarking information in order to inform decisions about funding and service levels using comparative data including performance information, for example to analyse levels of spend on services compared with measured outcomes.
- To undertake the review of budget monitoring information advice to large or complicated services with limited support from the Head of Finance. Undertaken complex financial modeling to evaluate project proposals.
- Promote the development of longer-term financial planning, including the use of whole life costing and sensitivity analysis.
- To develop measures to assess risk within services and projects to support robust performance management processes and reporting, especially in areas of high demand, cost volatility or significant third-party income and/or external funding.
- To carry out special investigations on behalf of a Head of Finance/Chief Accountant into significant budget variances.
- To prepare briefing notes for Head of Finance/Chief Accountant and the Assistant Director of Finance on technical or service financial issues for discussion with CLT/Members/Government Agencies.
- To undertake work for Overview and Scrutiny committees or for similar groups involving elected Members.
- To lead specific high level and complex projects as part of the Resource Allocation Plan, managing project teams and co-ordinating workstreams.
- Represents the local authority on regional fair funding groups and in meetings with the Government Departments such as DoF & DHSC, Education Funding Agency, MHCLG and other agencies.
- Preparation of relevant business cases to ensure appropriate challenge or interpretation.
- Sign off grant/returns for approval by Chief Finance Officer.
- The Post holder will provide leadership in producing budget data and accounts. This post may include leading on projects where this is agreed with the Head of Finance and Chief Accountant. It is expected this will largely be around financially / system based projects, but could include such projects as grant bidding or housing needs.

Person Specification

Specific qualifications, knowledge, and skills required for this role:

Essential

- Professional Accountancy qualification (CCAB) with post qualification relevant experience
- Significant experience of budgeting, statutory accounting and providing financial advice to non-finance managers, including the following activities:
 - Providing complex financial advice directly to senior non-finance officers, including senior managers and Directors.
 - Providing financial advice across multi-disciplinary and multi-organisational partnerships
 - Managing finance staff undertaking budgeting, statutory accounting and financial administration work.
 - Taking personal responsibility for budget development, budget monitoring and closing the accounts for large public sector services.
 - Experience of working with Board of Directors, Trustees or Members, or for similar groups of strategic leaders.
- Significant experience of financial/ technical/accounting/ledger maintenance
- Experience of staff management or ability to demonstrate the skills required
- Working on projects and carrying out financial analysis/modelling
- Able to analyse and interpret complex financial data and communicate findings clearly with staff with and without a financial background
- Project management
- Able to plan and prioritise work in order to meet strict deadlines
- Strong ICT skills, including Excel
- Understanding of financial systems and practical application of accounting standards
- Customer focus and able to responds positively to colleagues and customers
- Ability to stay calm and consider commercial factors.
- Ability to assess and act on information quickly
- Good listener, with good influencing skills
- Good presentation skills
- Team player with an excellent ability to work on own initiative plan and prioritise work, flexibility, to work to strict deadlines. Ability to work as part of a team, and under pressure to meet deadlines
- An excellent ability to demonstrate an understanding of accounting principles and practices relevant to the tasks associated with the job.
- An excellent ability to interpret government regulation and policy and present clearly financial implications of these regulations and policies
- An excellent ability to analyse and present clearly financial information.
- An excellent ability to communicate in verbal and written form that is clear and concise.

- An excellent ability to set timetables and priorities and organise work in order to achieve set goals in a specified timescale.
- An excellent understanding of current service and financial issues affecting local authorities.
- Flexibility with working hours in order to meet deadlines or attend meetings.
- Excellent ability to communicate, influence and negotiate with external agencies with limited senior officer support

Desirable

- Degree
- Formally trained in project management
- Local Government experience
- Negotiating and procurement
- Demonstrable experience of using ERP systems
- Experience of Microsoft Power BI or other analytical tools
- Familiarity with banking procedures and rules

Career Progression Framework

Accountancy

This career progression framework should be used as a basis to ensure that employees obtain the required level of skills and experience before advancing to the next step in the career grade.

This career progression framework supports the undertaking of the CIPFA Diploma route to become fully qualified Chartered Public Finance Accountant.

The levels within this career progression framework are as follows:

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| • Management Accountant | OS10-0984 | Grade J |
| • Business Analyst | OS11-0983 | Grade K |
| • Principal Accountant | MA14-2273 | Grade N |

Role	RD	Criteria
Management Accountant	OS10-0984	<p>Must meet the requirements set out in the role profile and role description in addition to the following:</p> <p>Working toward CIPFA Diploma in Management and CIPFA Diploma in Financial Accounting and Financial Management and Audit</p>
Business Analyst	OS11-0983	<p>Must meet the requirements set out in the role profile and role description in addition to the following:</p> <p>Achieved CIPFA Diploma in Management and Financial Accounting Management Accounting Financial Accounting</p> <p>Achieved CIPFA Diploma in Financial Management and Audit Audit & Assurance Business Planning & Financial Management Developing Strategy & Data Analysis</p> <p>Working towards CIPFA Diploma in Governance, Risk & Taxation CIPFA Diploma in Public Financial Management, Reporting and Business Change</p> <p>Take responsibility on key tasks for accountancy for example closure of accounts, reconciliations, modelling, budget monitoring and reporting, budget setting</p> <p>Work on own initiative, plan and prioritise work</p> <p>Represent accountancy on key transformation, improvement and technical projects/workstreams for the council to drive performance and continual improvement</p> <p>Prepare and present complex financial information to our customers including presentations to ELT, SMTs, boards</p> <p>Strong understanding of control environment and governance</p>

Role	RD	Criteria
		<p>Engage, review, and advise Principal Accountants and Heads of Finance on Business cases and Cabinet reports</p> <p>Build strong relationships with customers including Heads of Service and peers</p>
Principal Accountant	MA14-2273	<p>Must meet the requirements set out in the role profile and role description in addition to the following:</p> <p>Achieved full qualification and be working on portfolio:</p> <p>CIPFA Diploma in Governance, Risk & Taxation Business Reporting Governance and Risk Management Tax & Law</p> <p>CIPFA Diploma in Public Financial Management, Reporting and Business Change Implementing Business Change Strategic Public Financial Management Public Sector Financial Reporting Strategic Case Study</p> <p>Prepare and present complex financial information to our customers including Cabinet, CLT, ELT, SMTs, boards</p> <p>Work on own initiative, plan and prioritise work and lead and manage small teams</p> <p>Lead accountancy on key transformation, improvement and technical projects/workstreams for the council to drive performance and continual improvement</p> <p>Identify risks and mitigations and ensure controls and governance in place to rectify</p> <p>Engage, review and complete Business cases and Cabinet reports</p> <p>Build strong relationships with customers including Directors, Heads of Service and peers</p> <p>Represent the Head of Finance in senior stakeholder meetings</p>

Supporting information

Driving classification	
Occasional driver A valid UK driving licence is not required. Occasionally may need to travel to different locations in order to undertake the duties of the role.	<input checked="" type="checkbox"/>
Regular Driver Must hold a valid UK driving licence and have access to either their own car or a pool car in order to undertake the duties of the role, unless other forms of transport are available and viable to perform the role, including public transport, or unless a reasonable adjustment has been agreed.	<input type="checkbox"/>
Required Driver Must hold a valid UK driving licence and will drive a vehicle supplied by the Council in order to undertake the duties of the role.	<input type="checkbox"/>
Employees should refer to the Corporate Driving at Work policy for further information.	

Driving trigger points			
The trigger points set out below, regarding driving licence points and at-fault accidents, apply to all staff who drive on council business.			
Trigger Points	Corrective Driver Training Course or further action	Additional corrective training if appropriate or further action	
Points on driving licence	6	9	
Trigger Points	Discussion and advice on expected driving standards	Corrective Driver Training Course or further action	Additional corrective training if appropriate or further action
At fault accidents within a two-year period (whether work or personal)	1	2	3
Job applicants who drive must have 9 or less points on their driving licence, and must have less than 4 at fault accidents within a two-year period. If they meet the trigger points, they will be subject to the actions outlined in the table above.			
If holding a valid licence, occasional drivers will need to declare penalty points and no-fault accidents as requested. Depending on the role, decisions as to whether this might either affect appointment or require corrective driver training, will be made case by case.			

Political restriction

This role is politically restricted. The job holder is not permitted to undertake political activity involving standing for election as a member of parliament, as a member of the Scottish or Welsh Parliaments, as a local councillor. The job holder is furthermore not permitted to canvass on behalf of a political party or a person who is already, or who seeks to be, a candidate. In addition, they may not speak to the public or publish any written or artistic work that could give the impression they are advocating support for a political party	<input checked="" type="checkbox"/>
This role is not politically restricted	<input type="checkbox"/>

Professional fees and related occupational costs	
As part of this role, or to support professional development, the job holder is required to be a member of a professional body or association. The job holder is responsible for payment of all professional fees, memberships, registrations or subscriptions and no reimbursement or contribution towards these will be provided by the council	<input checked="" type="checkbox"/>
This role does not have any professional or occupational membership requirements	<input type="checkbox"/>

Clearances – Disclosure & Barring Service (DBS)	
This role will be engaged in 'regulated activity' providing specific services relating to children or vulnerable adults and is subject to a Disclosure from the Disclosure and Barring Service.	<input type="checkbox"/>
This role is exempt from the Rehabilitation of Offenders Act 1974 and will require an Enhanced DBS check before appointment can be confirmed.	<input type="checkbox"/>
This role is exempt from the Rehabilitation of Offenders Act 1974 and will require a Standard DBS check	<input type="checkbox"/>
The role requires a Basic DBS check to check for convictions and cautions that are considered to be unspent under the terms of the Rehabilitation of Offenders Act 1974.	<input type="checkbox"/>
This role is not subject to a Disclosure from the Disclosure and Barring Service in order to undertake the duties of the role.	<input checked="" type="checkbox"/>

Clearances – Baseline Personnel Security Standard (BPSS)	
This role requires access to the UK government Public Services Network (PSN) and is subject to a BPSS check	<input type="checkbox"/>
This role is not subject to a BPSS check	<input checked="" type="checkbox"/>

Clearances – Non-Police Personnel Vetting (NPPV)	
This role requires working in partnership with the police, and/or having access to Police related systems and is subject to a NPPV check at level 2* . (*regular access to police premises and police information, intelligence and financial or operational assets. Occasional access to those deemed 'secret').	<input type="checkbox"/>
This role requires working in partnership with the police, and/or having access to Police related systems and is subject to a NPPV check at level 3* (*regular unsupervised access to police premises and/or access to police information and/or information systems and/or hard copy material either on police premises or by remote access up to "secret" level. A level 3 includes a check on you, your spouse/partner, co-residents, and all family members).	<input type="checkbox"/>

This role is not subject to a NPPV check	<input checked="" type="checkbox"/>
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Safeguarding	
<p>For all roles within Children's Services. Wiltshire Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and all staff are expected to share this commitment. You will be expected to report any concerns relating to the safeguarding of children, young people or vulnerable adults in accordance with agreed procedures. If your own conduct in relation to the safeguarding of children, young people or vulnerable adults gives cause for concern, the council's agreed child protection/vulnerable adults protection procedures will be followed.</p>	<input type="checkbox"/>
<p>For all roles within Adult Social Services. Wiltshire Council is committed to safeguarding and promoting the welfare of vulnerable adults and all staff working for the council are expected to share a commitment to this. You will be expected to report any concerns relating to the possible abuse of a vulnerable adult in accordance with the agreed interagency safeguarding adults' procedures. If your own conduct in relation to the safeguarding of vulnerable adults gives cause for concern, the council's agreed interagency safeguarding adults' procedures will be followed, alongside implementation of the council's disciplinary procedure. The job holder is accountable for their safeguarding of vulnerable adult responsibilities to their line manager.</p>	<input type="checkbox"/>
<p>For all other roles within the council. Wiltshire Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and all staff are expected to share this commitment. You will be expected to report any concerns relating to the safeguarding of children, young people or vulnerable adults in accordance with agreed procedures. If your own conduct in relation to the safeguarding of children, young people or vulnerable adults gives cause for concern, the council's agreed child protection/vulnerable adults protection procedures will be followed.</p>	<input checked="" type="checkbox"/>