# Job Description and Person Specification

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| Job title  | Senior Finance Officer - Tech & Systems |
| Strategic team/Directorate  | Finance |
| Service  | Finance |
| Business unit | Systems & Redesign |
| Responsible to (day to day issues) | Reporting & Technical Development Manager |
| Accountable to (line manager)  | Reporting & Technical Development Manager |
| Salary grade (spinal column points only) | 28 - 31 |
| JE ref | JOT158 |

# Key Purpose of Job

* 1. To lead on and have responsibility for the development and integration of Logi Analytics into the councils Payroll and HR systems (Northgate / MyView).
	2. Provide support to the Reporting & Technical Development Manager to successfully manage projects and business objectives on behalf of the Authority.
	3. Provide support to the Systems Manager, in relevant tasks to ensure cover for absence.
	4. Responsible for the development, maintenance, and reporting of the Budget Monitoring & Preparation System (Collaborative Planning).
	5. To ensure day to day operation and correct function of overnight processes
	6. To lead on the future development of the Councils reporting solution (Microsoft BI, Logi Analytics) and liaise with service managers and finance staff to develop reporting solutions which provide strategic, financial, and business information at all levels within the organisation to support informed decision making.
	7. To develop new initiatives and recommend strategies that maximise the use and productivity of IT systems within Financial Services and the wider council in connection with their related service needs.
	8. To provide timely, accurate and relevant automated financial and non-financial information for several council systems to support service managers and Finance Staff in providing a comprehensive accountancy service

# Anticipated outcomes of post

* 1. That information provided to service managers and finance staff supports better decision making, productivity and efficiency improvements.
	2. Accurate financial information is provided to produce statutory and other council data returns in a timely manner.
	3. The further development of the corporate reporting solution to meet the needs of the organisation.
	4. The support of financial system-based projects throughout the authority in identifying, baselining, and developing service needs, support and advice in the development and production of outlines business cases for transformation projects
	5. The further development of the council’s new and existing Financial & Budget Preparation & Monitoring systems to ensure they meet the needs of Financial Services and the organisation.
	6. To keep abreast of reporting software development to ensure the most effective and efficient solutions are utilised

# List key duties and accountabilities of the post

* 1. To analyse business processes and evaluate new software, identify alternative solutions, assess feasibility, and recommend new approaches, for efficient service delivery and improving customer service.
	2. To identify potential problems and take preventative or mitigating action as appropriate, in advance including identifying gaps in performance and to develop and implement corrective actions.
	3. To manage projects that are subject to deadlines and frequently changing circumstances and priorities. Make decisions on projects as and when they arise then implement the decision through to a conclusion. Report on project progress, including identifying and managing resources, insights, and prognosis for the project to Projects and Technical Development Officer, advising immediately if plan tolerance levels are exceeded.
	4. To provide and develop timely, accurate and relevant automated financial information/reports for several council systems including (but not limited to):
* FIMS – Financial, Information & Management System
* Collaborative Planning (Budgeting module)
* SPAR - Performance Data
* Payroll – MyView (user interface) & Zellis (core Payroll System)
* HR – Workforce Planning
* OpenRevs – (e.g. Council Tax, NNDR, Housing Benefit system)
* Corporate Debt
* Print / Sefas / Cirrato (Printing & Photocopying software)
* Adelante – Income Management & Card Payments
* Taranto – Car Parking
* Planning Applications
	1. To use report writing software (currently Microsoft BI, Logi Analytics & Cognos) and knowledge to develop and write reports on the identified systems.
	2. Keep abreast of development to the report writing product to ensure it is used efficiently and effectively. Some self-teaching and investigation will be required
	3. Prepare, automate, and distribute reports in consultation with the requirements of the users (primarily service managers and finance staff), using mainly SQL (Sequential Query Language programming) and SQL Server.
	4. Deliver training, either in a group session or individually to staff.
	5. The documentation of processes and procedures for IT systems that come under the remit of the Head of Finance as well as the related Payroll system procedures, alongside the guidance/training manuals for staff to use the automated reporting systems and FIMS.
	6. To provide Financial System navigation Training for users of FIMS and CP
	7. Provide support as required to service staff and finance staff on the required reports.
	8. Take responsibility for the maintenance and assist with development & support on the council’s Budget Preparation & Monitoring System (Collaborative Planning).
	9. Although sitting in Financial Services this is a key technical post that requires IT programming and some Database administration skills to perform these duties and to provide maintenance and ongoing development & support of Microsoft BI & Logi Analytics.
	10. Lead on the development of new / updated financial (and related) projects as and when required and take the lead on some corporate reporting developments
	11. To provide a support service for users of the FIMS modules and provide support for the Financial Services System helpdesk.
	12. To ensure that external customers and our partner organisations (for example: Torbay and South Devon NHS Foundation Trust, TDA Ltd, SWISCo etc) have appropriate access to reports and real time data daily.
	13. Ensure that the principles of the Data Quality & Protection Policies are applied and that users of the Financial Information & Management System are made aware of their responsibilities with regards the policy.
	14. Liaison with external software suppliers as part of the ongoing development of FIMS, CP, Logi Analytics and Microsoft BI
	15. To provide creative, effective and efficient solutions with regards high level Council Wide project work (i.e. Transformation Programme) and other areas of work asked to participate in on an ongoing basis. Much of this work will require working autonomously and reporting to Project Boards as opposed to the normal line management.

# Budgetary/Financial Responsibilities of the post

* 1. None

# Supervision/Line Management Responsibilities of the post

* 1. Supervisory responsibility for the ‘Finance Officer – Technical’ and directing staff on project work. This will include training, and allocation & checking of work

# Working environment and conditions of the post

* 1. Normal working environment and conditions.

# Physical demands of the post

* 1. Normal physical effort.

# Specific resources used by the post

* 1. Usual IT equipment and accessibility for office working and home working.

# Key contacts and relationships

**External**

External Auditors

Council partner organisations and subsidiary companies

IT Software providers including the provider of the Council’s main finance system (Advanced) and Logi Analytics (amongst others)

Creditors and Debtors of the Council

Academies and other Schools

The Council’s bankers

**Internal**

Service staff at all levels

All Finance Staff

Internal Audit

FIMS, BI, Logi & Cognos Users

Payroll Services & Parking Services

IT Services

# 10. Other duties

To undertake additional duties as required, commensurate with the level of the job.

# Other Information

* All staff must commit to Equal Opportunities and Anti-Discriminatory Practice.
* The Council operates a Smoke-Free Policy and the post-holder is prohibited from smoking in any of the Council's buildings (including Council owned and Council leased buildings, but excluding designated areas in residential schemes), enclosed spaces within the curtilage of buildings, and Council vehicles. The Council does not permit smoking breaks within work time, however, in services where the flexi-scheme is in operation, employees may take reasonable break times outside of core hours, in accordance with flexi-time arrangements. Employees should follow the flexi-scheme procedure for agreeing time away from their duties in the normal manner with their immediate colleagues and line manager, with break start and finish times being recorded, as with any other break-time arrangement.
* The post-holder is expected to familiarise themselves with and adhere to all relevant Council Policies and Procedures.
* The post-holder must comply with the Council’s Health and Safety requirements as outlined in the H&S policy appropriate to the role.
* This post is historically based at Tor Hill House although changes to working from home practices allow for permanent or hybrid home working.
* The post-holder must be committed to the Council’s Core Values for employees – “Torbay Council employees are committed to being forward thinking, people orientated and adaptable - always with integrity”. Evidence will be sought during the probation and appraisal processes.
* If you are required to use your own vehicle on Council business or drive a council vehicle you will be asked to provide information on any driving endorsements by accessing [www.gov.uk/view-driving-licence](http://www.gov.uk/view-driving-licence) and providing a code to your Line Manager in order to share your driving licence information with the Council.
* You will be asked to complete a Criminal Records Self Declaration Form. Criminal convictions will only be taken into account when they are relevant to the post. You will only be asked to disclose ‘unspent’ convictions.
* Torbay Council is committed to safeguarding and promoting the welfare of children and applicants must be willing to undergo the checks appropriate to the post applied for.

# Person Specification

## Note for Candidate

### All Candidates

The supporting statement on your application form will be used to assess ability to meet the essential requirements of the role, so you should explain how you meet each of the numbered essential requirements within your supporting statement.

 In a competitive situation, the desirable criteria may be taken into consideration, so you are encouraged to show how you also meet each of the desirable criteria.

### Candidates who consider that they have a disability

Reasonable adjustments will be made to the job, job requirements or recruitment process for candidates with a disability.

If you consider yourself to have a disability you should indicate this on your application form, providing any information you would like us to take into account with regard to your disability in order to offer a fair selection interview.

Wherever possible and reasonable we will make adjustments and offer alternatives to help you through the application and selection process.

If you have indicated that you have a disability on your application form you will be guaranteed an interview if you clearly demonstrate in your supporting evidence how you broadly meet the essential requirements of the role.

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| --- | --- |
| Job title  | Principal Finance Officer - Technical |
| Strategic team/Directorate  | Finance |
| Service  | Finance |
| Business unit | Systems & Redesign |

## Skills and effectiveness

### Essential skills and effectiveness

1. Able to demonstrate effective communication to non-finance colleagues at all levels and to create effective working relationships which enhance and develop the finance service to managers and to be customer focused
2. The ability to work with a variety of customers and forge effective working relationships (e.g. working alongside budget holders, finance staff and senior officers and to adapt to local needs).
3. The ability to provide leadership and constructive support to colleagues working on departmental projects, alongside the ability to make decisions and recommendations, sometimes at short notice and take responsibility for them
4. Demonstrates commitment to colleagues, team objectives and collaborative working opportunities
5. Proven competency to handle confidential/sensitive personal information in an appropriate and secure manner
6. Able to convey financial and technical information accurately and simply in a manner that is easily understood by all recipients. The ability to provide information to support the completion of statutory grant and other returns with accuracy and timeliness. An eye to detail and accuracy are essential.
7. Able to manage a piece of work ensuring that all milestones are achieved, and deadlines are met by use of effective time management skills.
8. Flexible approach, able to work on own initiative and as part of a team with competing deadlines. The post holder is required to be quick thinking with a calm, patient, and pragmatic manner
9. Able to work well with competing demands and cope with a continually changing working environment.
10. The ability to provide information to support the completion of statutory grant and other returns with accuracy and timeliness
11. Able to undertake a diverse workload and produce desired outcomes within deadlines
12. The necessary skills to take responsibility and assist with system issues and make decisions on the fixes applicable
13. The IT technical skills required to complete the key duties of the post along with skills in database administration
14. Ability to contribute to corporate technical projects to develop/update reporting solutions and take the lead & responsibility for other projects
15. The ability to gain detailed knowledge (including background architecture) over a number of databases and use this to produce reporting solutions with self-directed learning as required

### Desirable skills and effectiveness

1. Effective presentation skills
2. Able to prepare and present documented material accurately and clearly that can be easily understood by a diverse audience

### Essential knowledge

1. The latest report writing knowledge using SQL (Sequential Query Language) for both Oracle and SQL Server - With the ability to grow and expand on this knowledge base.
2. Working and up-to-date knowledge of IT based systems. In particular - Knowledge of Financial Information Management Systems is essential to performing this job adequately.
3. Up to date, working knowledge of Windows-based software and of Microsoft Office applications; an advanced level of knowledge in TEAMS, Excel, Word & Outlook
4. Working knowledge of Local Authority accounting and relevant guidance (including Financial Regulations, LA Open Data)
5. Technical knowledge on how to develop and write reports over several different databases
6. Some previous recent knowledge of database administration
7. The ability to find technical development material on the internet and to self-teach where applicable
8. Working knowledge of the production of project management documentation including project briefs, project approach, project plans, project initiation documents, work packages, resource plans, risk & issues log

### Desirable knowledge

1. System Report writing knowledge on specific systems mentioned in the Job Description
2. Knowledge in the application of policy relating to Data Protection and Data Quality
3. A high level of knowledge of excel and its technical functions
4. Theoretical and practical knowledge and experience or PRINCE2 project methodology (or similar)
5. Business Process Reengineering skills, or similar
6. Knowledge of training techniques and methods

## Experience and achievements

### Essential experience and achievements

1. Recent experience of working within a financial environment for a complex organisation.
2. Up to date experience of critically evaluating and explaining financial information to finance staff and budget holders
3. Recent experience of system report writing in a complex organisation using Sequential Query Language Programme
4. Current experience of providing timely, accurate and relevant automated financial information from several different databases
5. Relevant technical experience of system administration & development
6. Experience of putting forward ideas in technical projects to develop/update reporting solution
7. Experience of reviewing procedure, developing, and suggesting system solutions to improve service delivery

### Desirable experience and achievements

1. Experience in budget monitoring, budget preparation and closedown procedures within a local authority
2. Some relevant experience in providing training either on a one-to-one basis or to a group
3. Previous experience of writing guidance and training manuals for staff to use
4. Some previous, successful experience of working as part of a project group
5. Experience of using PRINCE2 project methodology or, equivalent, to deliver successful projects

## Qualifications/professional memberships

### Essential qualifications/professional memberships

1. Educated to Degree level standard or equivalent or demonstrable work-related experience
2. IT Qualification:
	* The post holder should hold a nationally recognised IT qualification, covering a broad range of subjects/modules.
	* Qualified for example to BTEC Level 3 Diploma in IT or an equivalent IT qualification

### Desirable qualifications/professional memberships

1. Association of Accounting Technician or equivalent
2. PRINCE 2 Foundation Level or equivalent experience
3. MOS or ECDL European Computer Driving Licence equivalent

## Essential – Other requirements of the job role

* Ability to potentially travel around the Bay/Southwest/UK to carry out duties.