**Job Profile comprising Job Description and Person Specification**

**Job Description**

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| **Job Title:** Trainee Accountant | **Grade**: Scale 5 to PO2£24,225 to £41,361 (+ 2022/23 pay award pending) |
| **Section:** Financial Management | **Directorate:** Resources |
| **Responsible to following manager:**Financial Controller | **Responsible for following staff:**N/A |
| **Post Number/s:** | **Last review date:**April 2016 |

**Working for the Richmond/ Wandsworth Shared Staffing Arrangement**

This role is employed under the Shared Staffing Arrangement between Richmond and Wandsworth Councils. The overall purpose of the Shared Staffing Arrangement is to provide the highest quality of service at the lowest attainable cost.

Staff are expected to deliver high quality and responsive services wherever they are based, as well as having the ability to adapt to sometimes differing processes and expectations.

The Shared Staffing Arrangement aims to be at the forefront of innovation in local government and the organisation will invest in the development of its staff and ensure the opportunities for progression that only a large organisation can provide.

**Job Purpose**

To successfully complete the Chartered Institute of Public Finance and Accountancy (CIPFA) Professional Qualification (PQ).

To undertake a mix of general financial duties and specialist project work within a finance setting, following a work programme which takes into account both CIPFA’s requirements relating to full qualification and the resource needs of the department.

Continuation in post will be dependent upon satisfactory progress in the CIPFA examinations.

**Specific Duties and Responsibilities**

Undertakes planned placements in relevant sections of the department, reporting to the appropriate head of service for the duration of each placement. An on-site programme of work will be planned taking into account the Institute’s requirements relating to each stage of the professional examinations and resource needs across the department.

Attends college on day/block release as agreed in order to complete the Chartered Institute of Public Finance and Accountancy (CIPFA) qualification.

Assists in developing effective and efficient financial and administrative systems to ensure that the department can fulfil its financial responsibilities, including adhering to the system controls and procedures in place, and providing a professional and effective financial administration and support service.

Assists as directed to provide flexible response to peak workloads, requiring application of skills in a variety of different service environments across the department.

Ensures that the services for both Councils are dealt with on an equitable basis to deliver the standards required for each, as agreed annually by the Executives of both Councils.

Progression

At the different levels of this career grade post, the post holder will be expected to provide a range of services and undertake increasingly more responsible and independent work, with an increasing level of decision making at the respective levels. Four levels have been developed that reflect the different stages of the scheme, each with a separate set of competencies. Within the levels defined in each job description, grades will be dependent on:

* success in the CIPFA professional examinations
* satisfactory work performance
* relevant work experience
* acquisition of specialist knowledge
* level of responsibility taken.

The PAQ is made up of 12 modules which are completed in certificate and diploma stages. The progression process is set out below and is dependant on both progression through exams and the level of competency achieved at work.

| **Stage** | **Relevant Work Experience** | **Minimum time required** | **Grade** |
| --- | --- | --- | --- |
| Entry level | Meets the selection criteria for post. | - | Scale 5Inner London  |
| CIPFA Certificate | Successful completion of the Certificate Stage.Ability to undertake tasks at Level 1. | 12 months | Scale 6Inner London |
| Completion 50% of Diploma | Successful completion of at least 50% of DiplomaAbility to undertake tasks at Level 2 | 12 months | SO1Inner London  |
| Completion of Diploma | Successful completion of DiplomaAbility to undertake tasks at Level 3 | 6 months | SO2Inner London |
| Qualified | Successful completion of Final Test of Professional Competency, including the Initial Professional Development Scheme Ability to undertake tasks at level 4 | 6 months | PO1Inner Londonprogressing to PO2 for exceptional performance |

Experience and ability must be relevant, and at sufficient level of responsibility and technical competence to satisfy the grade. The following criteria will be applied.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Level 1 | Level 2 | Level 3 | Level 4 |
| Managing Workload | Is able to undertake delegated work in accordance with agreed timescales. | Manages a workload containing a mixture of regular and ad-hoc tasks to agreed timescales. | Manages a workload consisting of regular annual, monthly and quarterly tasks; ad hoc requests from management and longer term projects.  | Agrees and manages a workload against agreed performance targets, including an element of medium term project work.  |
| Management of Staff | Assists in the induction of new trainees and finance officers as appropriate. | Provides assistance to management in the management of temporary staff and new trainees / officers. | Manages the workload of temporary staff and new trainees as and when required. Undertakes a specific training task on behalf of management in order to address a specific work issue and has an ongoing supervisory role | Manages the workload of at least one member of staff in specific work areas.Plans and undertakes training task for a number of individuals to address specific work issues – providing detailed handouts and notes as required |
| Innovation and Creativity | Identifies practical solutions seen in use elsewhere and transfers them to their own situation. | Adapts and develops existing ideas, applying them to new areas. | Generates original ideas to address a problem or issue. | Questions and challenges existing processes, showing innovation and an ability to improve on current methods. |
|  | Level 1 | Level 2 | Level 3 | Level 4 |
| Financial Administration | Is able to input journals and make other entries onto the financial system(s). | Is able to translate given financial information into accurate accounting journals and budget requirements. | Identifies the need for journals and budget requirements in discussion with budget managers and actions them accordingly. | Is able to manage the accounts of distinct service areas and oversee their financial administration processes. |
| Communication of Information | Provides basic financial information to managers on request. | Is able to obtain financial information and translate into a meaningful format to present to managers. | Uses available IT and other resources to communicate complex financial information in a simplified manner. | Is able to utilise various methods including verbal presentations, tables, diagrams and written briefings to communicate high level and complex information. |
| Use of Corporate IT Systems | Is able to complete training courses on corporate financial systems and apply knowledge to undertake transactional and investigative tasks. | Is able to use financial systems to draw out relevant financial information. | Is able to utilise corporate systems to solve problems and meet relevant information needs. | Is able to contribute to major reviews of financial systems and applications, and suggest solutions to problems encountered. |
| Closing of Accounts | Can provide assistance in the closing of accounts through co-ordination of simple tasks and processing of journals as instructed. | Is able to co-ordinate aspects of closing. Can liaise with appropriate finance staff to resolve technical issues. | Identifies problems with closing tasks and acts accordingly.. | Is able to take oversee closing of accounts in defined areas. Can suggest improvements to the closing process. Displays technical knowledge of the issues involved. |
|  | Level 1 | Level 2 | Level 3 | Level 4 |
| Accounting Knowledge | Understands basic accounting principles. | Is able to apply basic principles and work in accordance with relevant rules and procedures. | Can apply complex technical rules where required. Applies relevant local government finance rules where required. | Can identify the need to apply accounting rules and concepts contained in the statutory guidance. Can brief senior officers on developments where appropriate. |
| Local Government Finance Knowledge | Shows knowledge of major issues within the local government finance arena. | Has awareness of major new developments and can communicate them to other officers. | Is aware of issues in local government finance and can identify possible areas of impact. | Has comprehensive knowledge of major local government finance issues including impending changes. Is able to identify and scope potential impacts. |
| Producing Financial Reports | Can collate data as instructed from relevant sources to feed into reports. | Identifies relevant sources and collates data. Provides in a clear and understandable format. | Uses a variety of graphs and tables to present data within reports. | Provides a full and explanatory narrative along with reports to meet relevant standards (Committee report format etc). |
| Analysing Financial Information | Extracts key information from paper and IT based statements and reports. | Identifies incorrect or exceptional data and takes appropriate action. | Identifies underlying trends and draws sound inferences from the information. | Makes sound recommendations for action based upon available financial information. |
| Manipulating Financial Information | Constructs simple spreadsheets to organise and summarise data. | Uses available IT solutions to manipulate data and produce reports for managers. | Can use appropriate applications to produce financial forecasts and projections. | Uses information to support arguments and recommendations. Draws sound conclusions. |

**Generic Duties and Responsibilities**

To contribute to the continuous improvement of the services of the Boroughs of Wandsworth and Richmond.

To comply with relevant Codes of Practice including the Code of Conduct and policies concerning data protection and health and safety.

To adhere to security controls and requirements as mandated by then SSA’s policies, procedures and local risk assessments to maintain confidentiality, integrity, availability and legal compliance of information and systems.

To promote equality, diversity and inclusion, maintaining an awareness of the equality and diversity protocol/policy and working to create and maintain a safe, supportive and welcoming environment where all people are treated with dignity and their identity and culture are valued and respected.

To understand both Councils’ duties and responsibilities for safeguarding children, young people and adults as they apply to the role.

The Shared Staffing Arrangement will keep its structures under continual review and as a result the post holder should expect to carry out any other reasonable duties within the overall function, commensurate with the level of the post.

**Person Specification**

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| --- | --- |
| **Job Title:** Trainee Accountant | **Grade**: Scale 5 to PO2 |
| **Section:** Financial Management | **Directorate:** Resources |
| **Responsible to following manager:**Head of Accounts | **Responsible for following staff:**N/A |
| **Post Number/s:** | **Last review date:**April 2016 |

**Our Values and Behaviours[[1]](#footnote-2)**

The values and behaviours we seek from our staff draw on the high standards of the two boroughs, and we prize these qualities in particular –

* taking responsibility and being accountable for achieving the best possible outcomes – a ‘can do’ attitude to work
* continuously seeking better value for money and improved outcomes at lower cost
* focussing on residents and service users, and ensuring they receive the highest standards of service provision
* taking a team approach that values collaboration and partnership working.

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| **Person Specification Requirements** | **Assessed by A &**  **I/ T/ C (see below for explanation)** |
| **Knowledge**  |
| Knowledge and understanding of the key issues affecting local government and local government finance in particular | A, T, I |
| A general understanding of financial management principles | A, T, I |
| **Experience** |
| Experience of working with figures | A, I |
| Proven experience of working as part of a team as well as on individual projects | A, I |
| **Skills** |
| Good interpersonal skills to maintain effective relationships with all levels of staff. | A, I |
| Self motivated with the ability to organise and prioritise own workload including studying, often working under pressure to meet deadlines and manage conflicting priorities | A, I |
| Good appreciation of current IT and the ability to apply this to performance of the role | A, T, I |
| Ability to provide creative solutions to issues and problems  | A, T, I |
| Ability to analyse and interpret financial and non-financial information | A, T, I |
| Ability to deal with a range of complex areas of work | A, I |
| The ability to present complex issues to individuals or groups, clearly and concisely both verbally and in writing | A, T, I |
| **Qualifications**  |
| Meets the minimum entry requirements for the CIPFA professional qualification | A, C |
| Minimum of 2:1 degree and 300 UCAS tariff points relating to three ‘A’ Level subjects or equivalent  | A, C |

**A - Application form**

**I – Interview**

**T – Test**

**C - Certificate**

1. These values and behaviours will be developed further as the SSA becomes established. [↑](#footnote-ref-2)