

**Job Description**

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| **Department** | **Chief Execs ( CX and PL Finance)** |
| **Job Title** | **Apprentice Financial Management information assistant** |
| **Grade** | C-D |
| **Primary Purpose of Job** | To assist and support the accountancy activities of the Finance Team and to successfully complete the apprenticeship framework/qualification |
| **Reporting To** | Group Accountant |
| **Direct Staffing Reports** | N/A |

**Main Duties ( During Qualification : Grade C )**

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| **1** | This is a developmental role, you will be responsible for gathering and recording evidence for your Apprenticeship and attending any lessons, training sessions or assessments arranged by your training provider or Supervisor/Team Leader |
| **2** | To undertake a development programme leading to a qualification, as part of an apprenticeship scheme; in order to combine practical on the job training with theoretical learning and development. |
| **3** | Undertake a work programme in order to acquire and develop the practical skills and knowledge of a Financial Management Information Assistant as detailed in the person specification.  |
| **4** | To utilise information technology to undertake a range of tasks. |
| **5** | To maintain manual and computerised systems, including inputting data, keeping records, statistics, confidential and general filing systems as directed.To maintain manual and computerised systems, including inputting data, keeping records, statistics, confidential and general filing systems as directed. |
| **6** | To assist in supporting the department preparing its revenue and capital monitoring statements, estimates and final accounts. |
| **7** | To provide support and to carry out functions relating to accounts payable, accounts receivable, and I-procurement. |
| **8** | To contribute to effective working relationships with colleagues, working as a team to deliver high standards of customer care. |
| **9** | Attend Team and other meetings as requested to receive and share information. |
| **10** | Answering enquiries from customers and colleagues in person, over the telephone and in writing. |
| **11** | Any other duties as assigned by your Supervisor/Team Leader in accordance with the nature and grade of the post. |
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| **Main Duties (On completion of qualification and subject to satisfactory review; Grade D).****All the above and in addition:** |
| **12** | Assisting with the accounting, reconciliation and system control tasks or their equivalent within the Finance Team. |
| **13** | Production of statistics and completion of reconciliations. |
| **14** | Provision of more complex advice to clients and other staff on policies and guidance. |
| **Date Job Description prepared / updated :** | **July 2024** |
| **Job Description prepared by:** | **Group Accountant** |

**Person Specification**

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| **Department** | **Chief execs** |
| **Job Title** | **Apprentice Financial management information assistant** |
| **Stage One** | Candidates who are care leavers, have a disability, are ex-armed forces or are a carer (see Carers-Charter-FINAL.pdf (gmhsc.org.uk) are guaranteed an interview if they meet the essential criteria for the role  |
| **The Minimum Essential Requirements for the above Post are as Follows:** | **Method of Assessment** |
| **1.** | **Grade C Skills and Knowledge** |
| 1. | Ability to put into practice new work based skills and demonstrate new competences gained through the Apprenticeship framework/standard. | Interview  |
| 2. | Ability to communicate effectively both orally and in writing. | Application form, Interview, Assessment Activity  |
| 3. | Willing to learn and to take responsibility for own development. | Interview  |
| 4. | Ability to use IT systems and software, including spreadsheets, competently to produce a variety of documents and to accurately input into and retrieve information from a database or computer systems. | Application form, Interview, Assessment Activity.  |
| 5. | Demonstrate numeracy skills to be able to check computer data and to provide statistical data, carry out reconciliations and complete returns. | Application form, Interview |
| 6. | Ability to develop and maintain effective working relationships with others and to work as part of a team. | Application form, Interview |
| 7. | Ability to work under own initiative including planning and organising own workload. | Application form, Interview  |
| 8. | Ability to work accurately and to deadlines as agreed. | Application form, Interview |
|  | **Competencies** – Please note the council’s corporate competencies, which are essential for all roles, are below in the Core Competencies section  | Interview |
| **2. Grade C Experience/Qualifications/Training etc** |
| 1. | Applicants must be willing to complete an Accounting Apprenticeship standard or framework of study. Anyone who has already completed an accounting qualification at Level 3 or above is not eligible to apply for this position. | Application Form/Interview |
| 2. | At least 5 GCSE’s (or equivalent) at Grade C or Grade 4 or above including Maths and English. | Application Form |
| **3. Work Related Circumstances** |
| 1. | All posts require the job holder to undertake mandatory training for the role and to regularly review their developmental needs in conjunction with their line manager. Development of our employees plays a key role in delivering our services | Interview |
| 2. | The Council has a framework of Values & Behaviours that guide our behaviour and decision making to help achieve our vision. All employees are expected to be mindful of these when undertaking their work. | Interview |
| **STAGE TWO** | Will only be used in the event of a large number of applicants meeting the minimum essential requirements |
| **Additional Requirements** | **Method of Assessment** |
| **1. Skills and Knowledge** |
| 1. | Competent in use of IT systems in particular the ability to use Microsoft Office Suite | Application Form, Interview |
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| **2. Experience/Qualifications/Training etc** |
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| Please note: on successful completion of the Apprenticeship the post holder will be assessed against the following criteria which are the minimum essential requirements of the Corporate Accountancy Assistant. A successful assessment will confirm the post holder in post on a permanent basis.**Progression to grade D is subject to review against the following criteria**  |
| **1.** | **Grade D Skills and Knowledge** |
| 1. | High level of numeracy skills to be able to check computer data and to provide statistical data, carry out reconciliations and complete returns. |
| 2. | Computing skills with an ability to interrogate spreadsheets and Microsoft, or similar office systems, and ability to input and retrieve often more complex information to/from computer systems. |
| 3. | The ability to communicate effectively both orally and in writing to a wide range of client groups including colleagues, customers, and suppliers. |
| 4. | Ability to work to deadlines and manage time effectively without supervision.  |
| 5. | Demonstrate an analytical and solution focussed approach that allows agreed timescales and deadlines to be met. |
| 6. | Ability to work on own initiative, using a range of interpersonal skills, demonstrating the ability to set own priorities/workloads whilst working towards the achievement of corporate and departmental priorities. |
| **2. Grade D Experience/Qualifications/Training etc** |
| 1. | Part or fully qualified AAT/IIA qualified or a minimum of 2 ‘A’ levels and at least 5 GCSE’s (or equivalent) at Grade C or Grade 4 or above, including Maths and English. |
| **3. Grade D Work Related Circumstances** |
| 1. | The post holder will be occasionally required to work outside normal office hours |
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| **Date Person Specification prepared/updated:** | **July 2024** |
| **Person Specification prepared by:** | **Group Accountant** |

**These core competencies are considered essential for all roles within Bolton Council. Please be prepared to be assessed on any of these during the interview process and, for the successful applicant, throughout the probationary period.**

**Developing Self & Others**

Promote a learning environment to embed a learning culture.  Support others to develop their skills and knowledge to fulfil their potential. Actively pursue your own development. Support and promote the principles of Investors in People.

**Civil Contingencies**

Bolton Council has a statutory duty under the Civil Contingencies Act to respond in the event of an emergency. If Bolton Council’s Emergency Management Plan is activated, you may be required to assist in maintaining key Council services and supporting the community.  This could require working outside of routine working hours and working from places other than your normal place of work.

**Equality & Diversity**

Uphold the principles of fairness and the Equality Act in all undertakings as a Bolton Council employee, including providing a fair, accessible service irrespective of customer’s race, religion, gender, sexuality, disability or age.

**Customer Care**

The ability to fully understand, assess and resolve the needs of all customers including those who present with complex situations, in a manner that respects dignity and expresses a caring & professional image.

**Health & Safety**

Take responsibility for the health and safety of yourself and others who may be affected by your acts or omissions, and comply with all health and safety legislation, policy and safe working practice, including participating in training activities necessary to your post.

**Data Protection and Confidentiality**

Ensure that any personal data or confidential data you hold is kept securely and is not disclosed, whether electronically, verbally or in writing, to any unauthorised third party. Follow Council policies and procedures on dealing with personal information and information assets, including The Code of Conduct, Data Protection, Acceptable Use and Information Security policies. Personal or confidential data should only be accessed or used for council purposes.

**Fluency Duty**

Should you be required, as a regular and intrinsic part of your role, to speak to members of the public in English, you must be able to converse at ease with customers and provide advice in accurate spoken English, as required byThe Immigration Act 2016.

**Working Hours**

The nature and demands of the role are not always predictable and there will be an expectation that work will be required outside of normal hours from time to time.

**Safeguarding**

This Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment. Should the role involve working with the above groups, you will be subject to an Enhanced Disclosure and Barred List check by the Disclosure & Barring Service.

**The values of an organisation are those key principles by which people are expected to work to day to day. They’re our culture and help define what is expected of each and every one of us**.





