

London Borough of Bexley

Job Description

Business Planning Technician

Grade Bexley07

Job Title:	Business Planning Technician
Grade:	Bexley07
Management Group:	Place
Department:	Housing and Strategic Planning
Sections:	Strategic Planning; Development Management; Economic Development and Skills; Regulatory Services
Reports to:	Clare Loops, Planning Policy Manager (Strategic Planning)
Responsible for:	No supervisory responsibility

Functional links with:

Budget Managers – assisting with the raising of orders and requisitions including reports to Spend Panel, the raising and receipting of invoices, the monitoring of spend and receipts, the claiming and draw down of grant and the forecasting of budget and income outturn.

Business finance partner – assisting with matters relevant to the interface between service area financial management and corporate finance systems and processes including accruals, journal transfers and the creation of budget lines.

External funders – assisting with liaison on the submitting of claims, drawing down and spending of money in accordance with funders requirements

Main purpose of the job

To provide technical support and advice on business planning and budget management matters within the Housing and Strategic Planning Department to help ensure:

- budgets and income targets are appropriately monitored and managed and outturn accurately forecast to aid effective, consistent and coordinated business planning across the department;
- external funding is claimed and spent in a timely manner and in accordance with funder requirements;
- fees, invoices, orders and payments are processed in an accurate and timely manner; and
- all necessary inputs are made into the corporate finance systems in accordance with required timescales.

Major duties and responsibilities:

- To assist in the development and maintenance of detailed financial monitoring reports to provide individual service area's Head of Service with expected financial outturns for budgets within their control and an overall budget position to the Deputy Director, Housing and Strategic Planning on a monthly basis.
- To assist in the production of a detailed overview of all revenue budgets within the department recognising the interdependencies to enable advice to be given

by budget managers on options to mitigate budget pressures both in year and in the future.

- To assist in the analysis of the overall budget outturn position to enable the communication of variations to senior financial colleagues in a timely manner and updates to the financial strategy for the council as a whole.
- To assist in the carrying out of in-depth, forensic analysis of all service area budgets to ensure data is correctly recorded, any required amendments being corrected by journal transfers.
- To have knowledge of Bexley's procurement, payment and invoicing procedures and detailed knowledge of finance IT applications.
- To have awareness of the Corporate Capital programme and revenue budget setting process and assist with the procedures required to bid for new funding and spend, including Spend Panel submissions.
- To support the management of external funding within the department, ensuring funding is fully claimed/applied whilst adhering to funder's rules and deadlines.
- To assist in liaison with internal and external audit where required.
- To assist the Heads of Service in meeting the finance requirements/processes for year end to ensure corporate timescales are adhered to and the necessary expenditure and income accruals are made.

Resources: N/A

Job activities:

The post holder will be expected to work on their own initiative with minimal direct supervision and support.

The post holder will be responsible for formulating, coordinating and leading allocated technical projects, including budgetary and programme control, in connection with any or all of the duties and responsibilities set out above.

The post holder will be required to monitor and manage allocated technical processes, identify issues and recommend and implement improvements where required.

Signed by:

Post holder: _____

Date: _____

Line Manager: _____

Date: _____

Deputy Director or Head of Service

Person Specification

Management Group: Place

Department: Housing and Strategic Planning

Sections: Strategic Planning; Development Management; Economic Development and Skills; Regulatory Services

Job Title: Business Planning Technician

Selection Criteria	Essential/ Desirable (E/D)	method of assessment (see key)
Education and formal training		
(a) minimum of two GCE A Levels (Grades A – C) or equivalent Level 3 qualification	E	A
(b) possess a formal accounting qualification (AAT/ACCA) to Level 4 qualification	D	A
Relevant technical experience and knowledge		
(c) experience of providing technical support in budget management and business planning including capital and revenue accounting	E	A/I
(d) ability to speak with confidence and accuracy, using accurate sentence structures and vocabulary	E	I
(e) ability to choose the right kind of vocabulary for the situation in hand without a great deal of hesitation	E	I
(f) ability to listen to clients and understand their needs	E	I
(g) ability to tailor your approach to each conversation appropriate to the client, responding clearly even in complex situations	E	I
(h) able to listen to and direct others	E	I
(i) able to collate, analyse and interpret data	E	A/I
(j) able to formulate, monitor and control budgets	E	A/I
(k) able to prioritise workload and produce and monitor work programmes	E	A/I
(l) experienced in the use of information and communication technology	E	A/I
(m) ability to provide clear written and oral information on technical issues	E	I

KEY: A = Application Form

I = Interview

Applicants will be assessed against the above selection criteria and the following high-performance indicators throughout the recruitment process.

High Performance Indicators

Values	Behaviours for staff	Behaviours for managers
Innovation	<p>I respond flexibly and adapt to changing demands</p> <p>I am prepared to take managed risks to achieve better outcomes</p> <p>I ask 'What if...?' to develop fresh thinking and innovative approaches to generate and implement solutions to improve performance and challenge the status quo</p>	<p>I routinely look for innovative and cost-effective ways to improve performance and customer service</p> <p>I champion change and deal successfully with ambiguity, enabling people to see positive and exciting possibilities for the future</p> <p>I take calculated risks based on available evidence and my professional judgement to learn and try new things</p>
Leadership	<p>I demonstrate a clear sense of purpose and direction, in line with organisational objectives</p> <p>I am willing to take difficult decisions</p> <p>My personal actions promote a positive image of Bexley</p>	<p>I take responsibility for my service and for making things happen to make a difference to my service users</p> <p>I create an environment where staff can thrive and show I value and trust staff, give praise and recognise good work</p> <p>I inspire, lead and encourage staff to move forward</p>
Collaboration	<p>I show respect for others and value contributions from internal and external partners and customers</p> <p>I recognise the right solution, regardless of who initiated it</p> <p>I seek out and work with partners who can help me achieve the outcomes and objectives I need to deliver</p>	<p>I encourage the feeling that the team is a collective unit with shared goals</p> <p>I engage with service partners and other areas of the Bexley organisation to understand the demands on others and seek solutions as One Council</p> <p>I network internally and externally</p>

Values	Behaviours for staff	Behaviours for managers
Listening and Responding	<p>I acknowledge other people's viewpoints and work with them to find a win-win solution</p> <p>I prepare and present information anticipating questions and problems</p> <p>I adapt my style to the audience and their needs, using the most appropriate communication channels</p>	<p>I seek regular service user feedback and review customer data to shape service improvements</p> <p>I ask staff for ideas on how to improve our service and how I can improve as a manager, listen to them and act on them</p> <p>I empower staff to make decisions and changes to improve value for money, customer service and productivity</p>
Open and Accessible	<p>I see issues from the customer / user perspective</p> <p>I monitor customer feedback and level of satisfaction with the service they receive, and use this to improve and pre-empt customer needs</p> <p>I seek to build and maintain positive relationships with customers and partners</p>	<p>I am accessible to my service users, customers, staff and Members</p> <p>I communicate and share a clear vision for the bigger picture as well as specific service areas</p> <p>I outline what is expected of individuals and their contribution to the whole, and am consistent in my expectations</p>
Impact	<p>I prioritise my activities and resources to focus on those which have the most impact for residents</p> <p>I take responsibility for making things happen and achieving my objectives</p> <p>I make decisions and clear recommendations based on my professional opinion and experience, informed by a range of information and evidence</p>	<p>I design services that provide value for money and deliver our outcomes, informed by evidence</p> <p>I produce, prioritise and adapt plans to meet changing requirements</p> <p>I set interim goals to achieve notable wins on the way to larger objectives</p> <p>I deal with poor performance</p>