

Director of Finance and Property Services.

Up to £142,600

Purpose of job

To provide strategic and operational leadership, direction and general management control in the functions delivered by Finance and Property services and to ensure that corporate and service-specific advice is provided as required to the Chief Executive, Depute Chief Executives, elected members and council committees.

To ensure that the day-to-day management of service areas within Finance and Property Services is effectively undertaken and that all service activities are effectively integrated and focused towards agreed council service and business objectives.

To contribute, through the Executive Management Team and the Corporate Management Team, to the development of overall council policy and provide strategic direction, in particular in relation to all financial aspects of the council including financial planning, driving efficiency, policy options, performance indicators and financial projections.

To act as the council's Section 95 statutory financial officer.

As the chair of the Finance and Property Services management team, take responsibility for the functioning success of the team.

Job scope

The Director of Finance and Property Services reports directly to the Chief Executive of the council and is responsible for ensuring that effective management systems and controls are in place within Finance and Property Services to deliver agreed service outputs to the required quality. The post holder has key responsibility for leading on the council's revenue, capital and treasury strategies and plans, including chairing the Capital and Asset Management Board.

There is a key requirement to contribute to the development of overall council policy in addition to providing the necessary leadership and management direction within service areas. In this respect, the Director of Finance and Property Services post provides a critical link between the operational and service delivery requirements of the council and the formulation and implementation of service and organisational strategy at Executive Management Team and Corporate Management Team level.

The post holder will analyse and interpret financial data to provide robust financial control and effective management of council resources, improving performance and mitigating risk. They will positively influence the development of key strategies and plans to ensure they align to corporate priorities and are consistent with agreed financial plans.

The Director of Finance and Property Services assumes significant budget, resource and managerial responsibilities as delegated by the Chief Executive and council standing orders and has direct responsibility for a service budget of approximately £36 million and circa 276 FTE staff across the functional areas of Audit, Risk and Counter Fraud; the Anti-Poverty Service; Financial Management Unit; Property Services and the Revenues Unit.

The post holder also has direct responsibility for non-service budgets of £72.5 million, such as loans fund, insurance, pensions and benefits payments.

The formulation and delivery of service plans and the development and support of employees through the Appraisal and Development Review process is another key requirement of the post.

Being responsible for operational effectiveness and service delivery will bring the Director of Finance and Property Services into frequent contact with elected members, other senior managers, community planning partners, external government and other agencies, including COSLA.

The post holder will require to form, maintain and develop key internal partnerships to ensure that the other service areas within the council have the opportunity to make their contribution to effective financial planning and tackling poverty, while recognising the key responsibility of the Head of Finance and Property Services.

Similarly, the Director of Finance and Property Services will require to maintain and develop key external partnerships in support of corporate and service agendas.

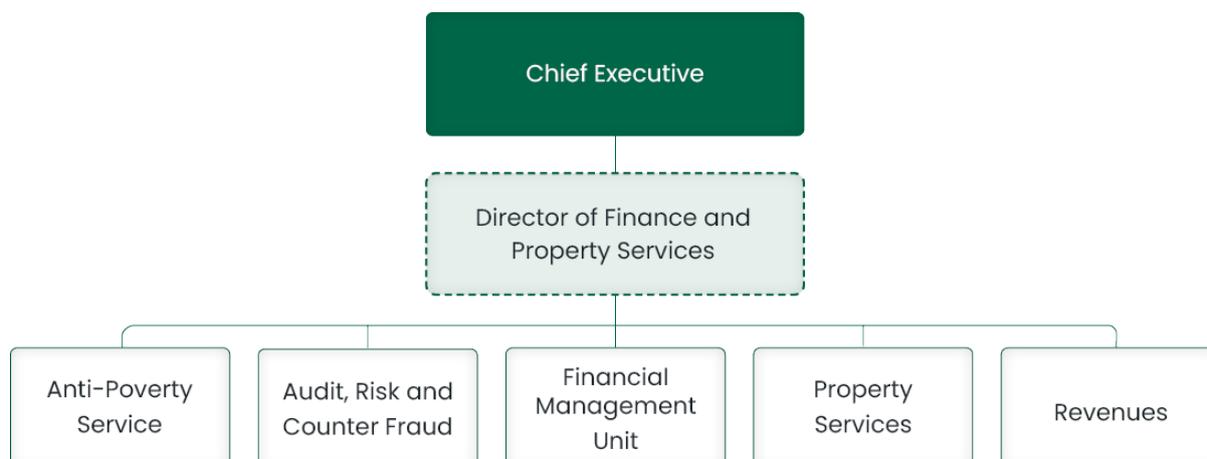
They will have a significant impact on the success of West Lothian Council and will have a considerable role to play in influencing its direction. It will therefore be necessary that the Head of Finance and Property Services demonstrates a wide and comprehensive vision of the partnership working arrangements which will be called upon in delivering effective outcomes across public sector services.

Allied to this will be the need for the Director of Finance and Property Services to seek opportunities to apply digital solutions to meet existing and future service needs.

The need to ensure proper compliance with best value, service audit requirements and quality standards is an important aspect of the job.

The areas covered provide a diverse range of services some with a high and sensitive political and public profile and form an important part of the council's strategic aim to address the needs of service users and communities in West Lothian through effective management and integration of services.

Organisational Chart for Finance and Property Services



The post holder is a member of the council's Executive Management Team along with the Chief Executive, Depute Chief Executives and Head of Corporate Services, and is also a member of the Corporate Management Team along with Heads of Service and the council's Governance manager.

Principal accountabilities/key tasks

- To perform the statutory functions of the council's Chief Financial Officer, or (in consultation with the Chief Executive) to agree appropriate arrangements for the carrying out of this function. Additional details about the role and function of the Chief Financial Officer are contained in Appendix 1.
- To carry out the statutory functions required of the council by relevant legislation and regulations.
- To produce and update effective and meaningful plans and strategies, both corporately and within the service area, whether statutory or in line with council and Community Planning mechanisms.

These include:

- Revenue Budget Strategy
- General Services
- Ten Year Capital Investment Strategy
- Capital Strategy
- Treasury Management Plan
- Property Asset Management Plan
- Anti-Poverty Strategy
- Internal Audit and Counter Fraud Strategy
- Risk Management Strategy
- Finance and Property Services Management Plan
- Finance and Property Services Business Continuity Plan

- To make a full and significant contribution from the service area to other planning requirements.
- Contracting with external providers to provide a range of services and projects. To take responsibility for representing the council's interest in a wide range of critical partnership arrangements, including the Community Planning Partnership Board, the Community Planning Steering Group, the Anti-Poverty Task Force and various groups involving Directors of Finance, COSLA, the Scottish Government and representatives from other professional groups such as SOLACE and ADES.
- To advise council officers and members of the council to allow them to discharge their responsibilities.
- Establish, implement and scrutinise robust governance systems, processes, practices and monitoring arrangements to ensure compliance and management of risk across Finance and Property Services.
- To manage service delivery within Finance and Property Services. To ensure appropriate processes of partnership working are in place to ensure an effective means by which staff, service users and communities can be involved in the delivery and planning of services.
- To ensure that policies are applied consistently and in particular to ensure the council complies with the statutory obligations.
- To lead the planning implementation and evaluation of service redesign projects across Finance and Property Services to improve efficiency and effectiveness of services, including promoting and consulting on proposals for organisation and service change to meet the needs of customers.
- To lead, manage and develop staff across Finance and Property Services, promoting excellent relationships within and between services and professional groups, ensuring staff can contribute effectively to the achievement of service objectives.
- To develop robust communication structures to ensure stakeholders are involved in, and able to influence, the planning, delivery and organisation of services.
- To be responsible for developing, publicising and ensuring compliance with the council's Occupational Health and Safety Policy in respect of the particular nature of the work activities with the services provided by Finance and Property Services.

Assignment and Work Review

Work is driven from the Council, council Committees, the Chief Executive, Depute Chief Executives.

The post holder reports to the Chief Executive and is expected to operate autonomously at senior management level and to manage the services and resources to meet agreed outcomes and targets.

Review of performance is undertaken through the agreement of performance objectives and individual appraisal by the Chief Executive. The appraisal process is conducted on an annual basis with a six-month review.

In respect of the role of Chief Financial Officer, these responsibilities are legally distinct from the management duties allocated to the post of Director of Finance and Property Services through the contractual employment relationship.

Accountability

Responsibilities include:

- Risk Management
- Health and Safety
- Business Continuity and Resilience
- Staff Governance and Healthy Working Lives
- Control the utilisation of an agreed financial budget framework that clarifies accountability for budgets, provides management teams with the necessary financial resources to deliver to agreed objectives/targets to ensure that they deliver value for money and control expenditure on an ongoing basis.
- Develop and manage the budget in line with financial instructions and plans, ensuring appropriate controls are in place to achieve good financial management and best use of resources.

Competencies – Essential

Qualifications/Training Professional/relevant qualification

Registration with appropriate professional accountancy body.

Educated to degree level or equivalent.

Skills

- Proven leadership skills in a senior managerial post.
- Strong interpersonal, motivational and influencing skills.
- Effective management and professional skills and knowledge covering operations, policy development, corporate communications and finance.
- Proven ability to instigate and facilitate change in a form that promotes proactive visioning and delivers co-operative working towards innovative solutions.
- Proven ability to work corporately and contribute effectively to the senior management of the council.
- High level of interpersonal and successful negotiation skills due to the substantial focus on team working.
- Able to work effectively and collaboratively with a range of stakeholders including customers, elected members, private sector, voluntary sector and public sector partners and local authority peers.
- Evaluating competing budgetary and service priorities to ensure that plans are co-ordinated to achieve maximum effectiveness and value for money in accordance with agreed council priorities.
- Substantial financial acumen with the ability to articulate and report complex information to support decision making. Financial analysis and problem solving skills.
- A commitment to equality of opportunity

Experience

- Significant management experience at a senior level in a related service area.
- Substantial experience in people and resource management in a complex organisational structure.
- Significant experience of leading large-scale projects and modernisation schemes.
- Substantial experience in managing and monitoring budgets.
- Evidence of sound financial management and commercial awareness with the ability to interpret and understand complex financial and budgetary information.
- Experience of dealing with elected members and senior managers at policy/strategic level.
- Experience of partnership working at a senior level
- Proven ability to manage budgets to
- achieve set targets and to deliver quarterly and annual reports.
- Established Chair and challenge skills to contribute to successful outcomes.

Competencies – Desirable

Qualifications/Training

Training in leadership/management

Experience

Significant in-depth experience of a senior management post in a local authority

Other Essential Information

The post is politically restricted in accordance with the Local Government and Housing Act 1989.

Review

As the council's management structure will continue to develop and meet new requirements, the post holder is expected to operate flexibly within this remit. If necessary, the post holder may be required to be responsible for a different range of service areas in the future.

Appendix 1

Role description for statutory role of Chief Financial Officer

CHIEF FINANCIAL OFFICER	
1	Legislation and guidance
1.1	The Chief Financial Officer is a statutory appointment by virtue of section 95 of the Local Government (Scotland) Act 1973 (the 1973 Act). It is sometimes referred to as “the Section 95 Officer”. The post is established under different legislation to its equivalent in England and Wales where the legislation is more prescriptive and expansive about the role, powers and responsibilities.
1.2	There is no statutory guidance about the post. The Chartered Institute of Public Finance and Accountancy’s “Statement on the Role of the Chief Financial Officer in Local Government” (2016) provides well-regarded advice and assistance (CIPFA Statement).
1.3	By virtue of section 2(1)(b) and (6)(d) of the Local Government and Housing Act 1989 (the 1989 Act), the Chief Financial Officer is a politically restricted post.
2	Appointment
2.1	Permanent appointments must be made by full council or a committee with appropriate powers. Temporary or interim appointments may be made by the Chief Executive (Council Executive, 18 January 2022).
2.2	The same person cannot hold the statutory post of Monitoring Officer (section 5(1) of the 1989 Act).
2.3	The appointment is identified in the council’s Scheme of Delegations to Officers in the entries relating to the substantive post held. It is also included in the list of Proper Officer appointments in Appendix 2 to the Scheme. The officer appointed will have corporate and management responsibilities and employment duties, not included here, arising from their substantive post. The CIPFA Statement is a useful source for identifying what those related, but non-statutory, duties should comprise.
3	Qualifications
3.1	The law does not require the Chief Financial Officer to hold any specific qualifications. Legislation for the English and Welsh equivalents requires membership of a specified accountancy body. The CIPFA Statement recognises that as widely-acknowledged good practice.
3.2	The statutory responsibilities and duties of the post point to the post-holder being at the highest level of senior management, holding accountancy qualifications and relevant professional body membership.

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4	Duties and powers
4.1	<p>The principal statutory duty of the post is to have responsibility for the administration of the arrangements that must be made by the council for the proper administration of its financial affairs (section 95 of the 1973 Act).</p> <p>The Chief Financial Officer must therefore ensure those arrangements are made and then take responsibility for their administration.</p>
4.2	“Proper administration” is not defined in law. Drawing on the CIPFA Statement, it comprises: -
4.3	<ul style="list-style-type: none"> • ensuring compliance with statutory requirements for accounting and internal audit
	<ul style="list-style-type: none"> • ensuring corporate responsibility for securing proper administration of the council’s financial affairs, including observing proper accounting practices
	<ul style="list-style-type: none"> • managing the council’s financial affairs in all its dealings
	<ul style="list-style-type: none"> • recognising the fiduciary responsibility owed by the council to local taxpayers
4.4	“Financial affairs” is not defined in law either. Its components (for example, funds and ac- counts, investments, borrowing, council tax setting and collection) are found in a wide range of primary and secondary legislation (not listed here).
4.5	<p>In one area of financial administration, statutory duties are imposed directly on the Chief Financial Officer rather than on the council as a corporate body. Those relate to audit of the council’s accounts and are found in the Local Authority Accounts (Scotland) Regulations 2014. They require the Chief Financial Officer to: -</p>
	<ul style="list-style-type: none"> • set up and maintain accounting control systems, and accounting records and sup- porting accounting records, ensuring the accounting control systems are observed and that accounting records are kept up to date - regulation 6(6) and 6(7)
	<ul style="list-style-type: none"> • ensure the statement of responsibilities in the annual accounts accurately reflects the Chief Financial Officer’s responsibilities – regulation 8(5)
	<ul style="list-style-type: none"> • ensure the financial statements in the annual accounts give a true and fair view of the council and its group’s financial position at the end of the financial year and of their transactions for that year – regulation 8(5)
	<ul style="list-style-type: none"> • certify those matters by signing and dating the statement of responsibilities and the balance sheets in the annual accounts – regulation 8(6)
	<ul style="list-style-type: none"> • submit the annual accounts to the auditor no later than 30 June each year – regula- tion 8(6) and (7)
	<ul style="list-style-type: none"> • advise the council as to whether the audited annual accounts should be signed – regulation 10(2)

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	<ul style="list-style-type: none"> • after approval of the annual accounts for signature, sign the statement of responsibilities and the balance sheets in the annual accounts – regulation 10(3)
	<ul style="list-style-type: none"> • certify that the financial statements give a true and fair view of the council and its group's financial position at the end of the financial year and of their transactions for that year – regulation 10(6)
	<ul style="list-style-type: none"> • after signature of the annual accounts, provide the annual accounts, including the signed statements, to the auditor – regulation 10(7)
4.6	<p>The council's Scheme of Delegations describes decisions and actions that may be taken without reference to elected members and so those where committee or council decisions are required. It may be necessary or advisable to seek approval from members in certain circumstances. The Scheme also permits sub-delegation of authority to other council officers to act in their name and on their behalf.</p>