

Manager Financial Planning

Department	States Treasury and Exchequer	
Section	Financial Planning	
Reports to	Head of Financial Planning	
JE Ref	STE1021	
Grade	CS13	JE Date: 28/1/2022

Job purpose

The Financial Planning Manager will develop and embed the Financial planning best practices in the States Treasury and Exchequer that will include, introducing robust methodologies, consistent reporting, tracking key performance metrics to enhance the accuracy, timeliness and the customer experience of the planning process.

The post holder will be analytical in nature and a problem solver who will translate the political objectives into efficient Government plans and identify trends, risks and opportunities. He/ she will build mitigating strategies and solutions to make robust Government plans. The post holder will be able to influence senior stakeholders, for example, Head of Analytics and Management Information, departments of States Treasury and Exchequer and Finance Business Partners. The role will strive for continuous improvement and innovation in the overall planning process and will ensure that the golden thread running from strategic priorities will bind the corporate plan to service delivery.

Job specific outcomes

- Play a key role in setting and agreeing the framework for financial planning through guidance and support to officials and Ministers in translating political objectives and priorities into coherent, costed, achievable, affordable initiatives
- Work with the Head of Financial Planning orchestrate the annual budgeting process (estimated budgets between £50m and £200m) (tailored for capital and revenue) producing a detailed, comprehensive Government Plan focussed on efficient and effective service delivery which integrates medium to long term financial planning and demonstrates a clear and consistent golden thread aligned to the Corporate Plan.
- Work with the Head of Analytics and Management Information to ensure common and consistent reporting can be used so there is one version of the truth. This will ensure that there is 'one version of the truth' on finance and performance from departments and corporately – helping ensure public money is safeguarded at all times and used appropriately (economically, efficiently and effectively). Advise Jersey Ministers on financial planning and wider financial management.
- Support the Head of Financial Planning produce an ambitious Government Plan for the States of Jersey (accompanied by agreed forecasted costs and benefits), working with teams from T&E, other departments/Arm's Length Organisations as required. This is a vital role for the States, building trust with Islanders that objectives/goals are affordable over the long term.
- Support the coordination of financial reporting and responses that facilitate the smooth running of the Corporate Governance framework, including (and not limited to) reporting to the Executive

Management Team, Corporate Strategy Board, Risk & Audit Committee, Scrutiny Panels and Public Accounts Committee.

- Assist in the drafting and securing agreement to a costed Corporate Plan. Advising Senior Leadership and Ministers with clear recommendations, driving and maintaining a deep understanding of cost and performance drivers, and the importance of being able to measure outcomes.
- Using the information on performance of the overall organisation, and Arm's Length Organisations, identify and report financial risks, from the short term to the long term. Aim to drive innovation, share best practice, whilst also providing potential solutions and mitigating strategies.
- Work with Departments, and colleagues across Finance (particularly Business Partners in Performance, Accounting and Reporting) to define, establish and embed operational service performance levels and key metrics linked to the strategy and monitor their ongoing performance. Working collaboratively to identify corrective measures where performance deviates from expectations to ensure the objectives of the strategic plan are achieved.
- Drive improvement and best practice for planning, budgeting and forecasting processes, focusing on accuracy, timeliness, functionality and valuable insight.
- Collaborate with colleagues in Strategic Policy, Performance and Population, and other relevant teams to ensure data is available to help combine financial and operational performance information.
- Take a lead in implementing the 'One Finance' vision set by the Treasurer of the States to ensure the States of Jersey receive high standards of service and consistent finance communication from all areas of finance.
- Propose and influence methods to improve financial management, financial literacy and processes and, if necessary, challenge the status quo to drive this improvement.
- Manage own professional development, keeping up to date with relevant tools and techniques as well as the impact of accounting standards and Public Finance Law on the long term sustainability of the States.
- Undertake other duties and responsibilities of a similar nature as may be required from time to time.
- Ensure appropriate mechanisms are in place for staff appraisal and development; influence the progression of learning and development plans contributing to the continuous improvement, development and professionalism of a team of multi-functional staff.

Statutory responsibilities

Active engagement, participation and compliance with any other statutory responsibilities applicable to the role, as amended from time to time.

This role is politically restricted. The jobholder is not permitted to undertake political activity involving standing for election to the States or as a Parish Constable, or publicly supporting someone who is standing for election or playing a public part in any political manner.

Organisational structure

One Government Departments



Organisation chart



Person Specification

Specific to the role

ATTRIBUTES	ESSENTIAL	DESIRABLE
Qualifications	Degree, Qualified Accountant or Equivalent Experience	
Knowledge	Knowledge of; <ul style="list-style-type: none"> - The role of the Finance Function in leading and driving organisational wide financial stewardship. - Corporate Strategy development and how this links to every aspect of finance. - States of Jersey Public Finance Law, or equivalent, and its application to financial planning. - The role of Finance in maintaining accurate data and systems as appropriate to the role. - Statutory and management financial reporting as it relates to this role. 	Knowledge of; <ul style="list-style-type: none"> - The activity and processes of Government including interaction between politicians and officials - The Policy process and the role of Finance in policy development, execution and realisation.
Technical / Work-based Skills	Numerical skills and the ability to work accurately with figures whilst under pressure and produce management information. Analytical skills. IT skills, with a knowledge of Microsoft office software, in particular Excel with the ability to use formulas, development of spreadsheets, and the ability to analyse and present statistical and performance data. Ability to apply accounting concepts to the production of accounts and management information.	
General Skills/Attributes	Intermediate oral communication skills with the ability to adapt the approach dependent on circumstances High level of customer service. Ability to work at pace and retain a resilience in the face of pressurised situations. The ability to prioritise and manage the workload.	

<p>Experience</p>	<ul style="list-style-type: none"> - Est. 0-5 years post qualification experience working in a public sector finance role. - Experience working alongside senior stakeholders within Government. - Experience of financial planning in a public sector organisation. - Experience of working with financial models. 	<ul style="list-style-type: none"> - Experience in drafting and delivering regular reporting to relevant boards, including Executive Management Board, Senior Management Team and the Council of Ministers. - Experience leading, inspiring and developing teams.
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Personal Attributes

Appointees to this role will be required to adhere to and perform their duties in line with the standards identified in the States of Jersey tier 4 core accountabilities attributes and behaviour indicators.